



# Automation Services 9.5

## ReadMe

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# Automation Services 9.5 ReadMe

Automation Services makes it easy to configure and use sophisticated workflows with Quark Publishing Platform™.

# 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/9.html](http://support.quark.com/documentation/Publishing_System/9.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 SQL Server Compact 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 Quark Publishing Platform 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

- Quark Publishing Platform Client 9.5
- 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 release 3 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.

- ➔ The Automation Services uninstaller does not remove data files. Consequently, if you are upgrading from an earlier release, you can uninstall Automation Services and then install the new version without losing any customizations.

## 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](#)."
- ➔ If you are installing on Windows, see "[Installing Drupal on Windows](#)."

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>).

## Installing Drupal on Windows

To install Drupal for Automation Services on Windows Server 2003 or 2008:



- 1 Make sure the Application Server Role is installed in Internet Information Services (IIS).
- 2 In a Web browser, go to <http://www.microsoft.com/web/downloads/platform.aspx>.
- 3 Click **Download It Now** to download the Microsoft Web Platform installer.
- 4 Run the installer.
- 5 In the **Web Applications** tab of the Web Platform Installer dialog box, check **Acquia Drupal**.
- 6 In the **Web Platform** tab, check **URL Rewrite 2.0**.
- 7 Click **Install** and follow the instructions on the screen. You can either install to the default Web site or create a new one.
- 8 In a Web browser, go to [http://\[site\]:\[port\]/install.php](http://[site]:[port]/install.php) and follow the instructions on screen. When you get to the screen that shows the **Clean URLs** option, click **Enabled**.
- 9 Follow the instructions in "[Configuring Drupal for Automation Services](#)."

## 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>.

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- 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 ``).
  - i) Click **Send to Drupal**.
  - j) Verify that the picture file was uploaded to the "images" folder in your "htdocs" directory.

- ➔ If the profile executes successfully but the picture files are not uploaded to Drupal, make sure that network services and the IIS\_IUSRS user have write access to the `C:\Windows\Temp` folder.

## Installing server components

The topics below explain how to install Automation Services on a server computer.

- ➔ If you install Automation Services on a 64-bit computer, you may need to set the **Enable 32-bit Applications** attribute to **True** for the **Automation Services** application pool. You can access the Automation Services application pool with IIS Manager.

## 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 Quark Publishing Platform 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 Quark Publishing Platform Client is installed.
  - 2 Make sure IIS is up and running.
  - 3 If you want to use Automation Services with a Web site other than the default Web site, create the new site in IIS.
- ➔ If you host Automation Services on a new Web site, you must add that site's port number to the Windows Firewall exception list.
  - ➔ If you are using SharePoint 2010, you must create a new Web site for Automation Services.
- 4 Double-click the "Automation Services.exe" icon in the "Client" folder and follow the instructions on the screen.
  - 5 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.
  - 6 Give the `IIS_IUSRS@[server computer name]` object **Full Control** privileges for the "Automation Services - Server" folder.
- ➔ It is critical to specify the server computer's domain name with the "IIS\_IUSRS" object.

- 7 Recycle the Automation Services application pool and restart the Automation Services Web site.

### Installing on Windows Server or Windows Vista

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

- 1 Make sure Quark Publishing Platform Client 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 If you want to use Automation Services with a Web site other than the default Web site, create the new site in IIS.
- ➔ If you host Automation Services on a new Web site, you must add that site's port number to the Windows Firewall exception list.
- ➔ If you are using SharePoint 2010, you must create a new Web site for Automation Services.
- 4 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 Quark Publishing Platform 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 Quark Publishing Platform Client is installed.
- 2 Make sure IIS is up and running.
- 3 If you want to use Automation Services with a Web site other than the default Web site, create the new site in IIS.

- ➡ If you host Automation Services on a new Web site, you must add that site's port number to the Windows Firewall exception list.
- ➡ If you are using SharePoint 2010, you must create a new Web site for Automation Services.
- 4 Double-click the "Automation Services.exe" icon in the "Client" folder and follow the instructions on the screen.
- 5 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.
- 6 Give the [server computer name]\ASPNET object **Full Control** privileges for the "Automation Services - Server" folder.
- 7 Reset IIS from the command prompt.

## Installing client components

To install the client components of Automation Services:

- 1 Make sure Quark Publishing Platform Client 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 all instances of QuarkXPress Server to return QuarkXPress projects.

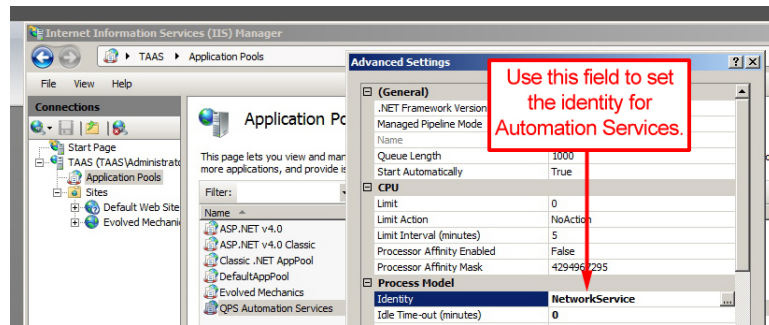
## Setting access privileges

To work properly, Automation Services must have sufficient access privileges to all of the save locations that you have specified in your automation profiles. To set up access privileges:

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

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- 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 **Quark Publishing Platform Automation Services** icon and choose **Advanced Settings**.

- 3 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.
  - 4 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.
- 5 If the computer is a 64-bit computer, give full security rights to [computer name]\IIS\_IUSRS to the "AutomationServices\_Data" folder in the Automation Services application folder.

### Preventing COM errors

On Windows Server 2003, the **Publish to App Studio** workflow sometimes fails with the following error: "System.Runtime.InteropServices.COMException (0x80080005): Retrieving the COM class factory for component with CLSID {ID} failed due to the following error: 80080005." To avoid this issue:

- 1 In IIS Manager version 6, right-click the **QPS Automation Services** application pool, choose **Properties**, click the **Identity** tab, click **Configurable**, and enter a domain user name and password.)  
  
In IIS Manager 7, right-click the **QPS Application Services** application pool, choose **Advanced Settings**, click the button for **Identity**, click **Custom account**, and then enter a domain user name and password.
- 2 Choose **Start > Administrative Tools > Computer Management**. In the tree on the left.
- 3 Navigate to **System Tools > Local Users and Groups > Groups**.

- 4 In IIS Manager 6, right-click the **IIS\_WPG** group, choose **Properties**, and add the same domain user to the **Members** list.

In IIS Manager 7, right-click the **IIS\_IUSRS** group and choose **Properties**, and add the same domain user to the **Members** list.

Alternatively, if you want to use an existing user that has admin privileges, go to **Application Pool > Advanced Settings > Process Model** in IIS and set **Identity** to the name of that user. Next, launch the Windows Server Manager application, navigate to **Configuration > Local Users and Groups > Groups**, and add that user to the **IIS\_IUSRS** group. Finally, make sure that user must have full security rights to the folder that Automation Services saves files to.

# Upgrading

The topics below explain how to upgrade Automation Services from version 8.x, 9.0, 9.1, or 9.2 to version 9.5.

## Upgrading the server component

To upgrade the server component of Automation Services:

- 1 Disable any virus protection software. If you are concerned about a virus infecting your computer, run a virus check on the installer file, then disable your virus detection software.
- 2 Double-click the installer icon and follow the instructions on the screen.

## Upgrading the client component

To upgrade the client component of Automation Services:

- 1 Uninstall the the client component of Automation Services.
- 2 Upgrade or install Quark Publishing Platform Client 9.5. For more information, see the *Quark Publishing Platform ReadMe*.
- 3 If MapForce 2010 is not already installed, install it. Note that both MapForce Enterprise and the integration package must be installed.
- 4 Install the Automation Services 9.5 client component. For more information, see "[Installing client components](#)."

## Upgrading transformations

If you have a transformation that was last saved in Automation Services 8.5 or earlier, you can convert it for use with the current version in two ways: by replacing schemas, and manually.



## Upgrading transformations by replacing schemas

To upgrade a transformation created in Automation Services 8.5 or earlier by replacing schemas:

- 1 Unzip the .zip file that contains the transformation.
- 2 In the unzipped folder, navigate to Resources\Schema and replace the old versions of the files "Modifier.xsd" with the latest version of this file. You can find the new version of "Modifier.xsd" in [Quark Publishing Platform Client\AutomationServices\\_Data\Resources\Transformation\Schema](#).
- 3 Compress the contents of the decompressed folder.
- 4 Give the compressed file the same name as the original .zip file, but change the version number in its name to 9.5.
- 5 Copy the zipped file to the Automation Services deployment folder ([Automation Services - Server\AutomationServices\\_Data\Resources\Deployment](#)).
- 6 Restart IIS.
- 7 Relaunch Quark Publishing Platform Client.
- 8 Duplicate the transformation and then open the copy.
- 9 Remove the QPSEntitymodel components (if any) and replace them with the QPPEntityModel components.
- 10 Correct the paths for the input files if necessary.
- 11 Click **Reload Content**.
- 12 Save and deploy the transformation.

## Upgrading transformations manually

To manually upgrade a transformation created in Automation Services 8.5 or earlier:

- 1 Launch Quark Publishing Platform Client 9.5 and display the **Transformation** pane.
- 2 Create a duplicate of the transformation.
- 3 Open the duplicate transformation for editing.
- 4 Delete any components that use the Modifier schema.
- 5 Delete any components that use the Quark Publishing PlatformEntityModel schema.
- 6 Display a command prompt and enter `cd %temp%`. The active directory changes to the temporary directory.
- 7 Within the temporary directory, navigate to [Quark Publishing PlatformClient/Work/Transformation](#). This directory contains all transformations that are open for editing.
- 8 In this directory, navigate to the subdirectory corresponding to the active transformation.

- 9 In this directory, navigate to [Resources/Schema](#).
- 10 In this directory, delete the following files:
  - Modifier.xml
  - Modifier.xsd
  - Quark Publishing PlatformEntityModel.xml
  - Quark Publishing PlatformEntityModel.xsd
- 11 In Quark Publishing Platform Client, replace the Modifier and QPSEntityModel components you deleted with new components that use the 9.5 Modifier and QPPEntityModel schemas and rewire the transformation with these components.
- 12 Save, deploy, and test the transformation.
- 13 Delete the old version of the transformation.
- 14 Upgrade any automation profiles that use this transformation. For more information, see ["Upgrading automation profiles."](#)

### Upgrading automation profiles

- ➡ The XML asset type was introduced in Automation Services 9.1. Consequently, if you are upgrading a transformation that uses Quark Publishing Platform metadata for an XML asset, make sure you update the schema from Others to XML.

To upgrade an automation profile to work with Automation Services 9.5:

- 1 Launch Quark Publishing Platform Client 9.5 and display the **Automation** pane.
- 2 Create a duplicate of the automation profile
- 3 Open the duplicate automation profile for editing.
- 4 Everywhere the automation profile uses a Quark Publishing Platform path (for example, in template paths, image paths, and transformation inputs), replace the old path with a new path that uses the new Quark Publishing Platform collections architecture.
- 5 Everywhere the automation profile uses a Quark Publishing Platform search (for example, in event-based automation profiles), recreate the search using the new Quark Publishing Platform collections architecture and substitute the new search.
- 6 Save, deploy, and test the automation profile.
- 7 Delete the old version of the automation profile.

# Uninstalling

You can remove Automation Services software by using **Control Panel > Add or Remove Programs** (Windows XP, Windows 2003) or **Control Panel > Programs and Features** (Windows Vista, Windows 7).

➡ Before you uninstall, be sure to back up your "Automation Services\_Data" folder.

# Changes in this version

This version of Automation Services includes the following changes.

The new XSL transformation lets you use XSLT. This transformation is independent of mappings. All automation profiles that use transformations can use the XSL transformation.

You can now check in a document as a major or minor version. This setting is available in the QPPEntityModel schema.

You can now use the HTTP protocol for streaming transport.

# Contacting Quark

If you have questions about installing, configuring, or using this software, please contact Quark Software 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](mailto:enterprisesupport@quark.com).

For product information, please visit the Quark® Web site at [www.quark.com](http://www.quark.com), or send an e-mail message to [cservice@quark.com](mailto: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](mailto: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
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## CONTACTING QUARK

- United Kingdom: 0808.101.7082

For product information, please visit the Quark Web site at [euro.quark.com](http://euro.quark.com), or send an e-mail message to [eurocservice@quark.com](mailto: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](mailto:austechsupp@quark.com).

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