QDABRA DATABASE ACCELERATOR V2.2 & V2.3

Create a SQL-based SharePoint Data View to access your DBXL Forms

One way to integrate DBXL forms with SharePoint is by creating a Data View using SharePoint Designer. In minutes, you can have a custom view of all your forms and the links needed to work with them.

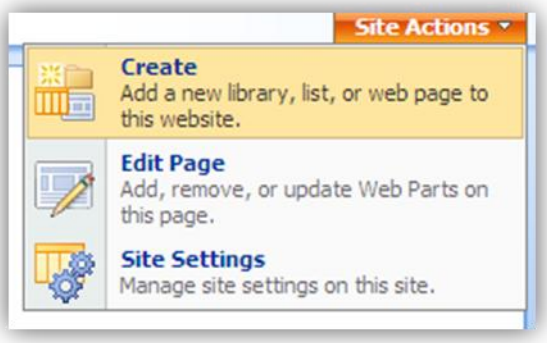
PRE-REQUISITES

To successfully complete this tutorial, you MUST have the following:

- A DBXL Document Type with SQL Mapping. Please verify that this SQL Mapping is working as expected, because the connections in this tutorial depend on the data that is mapped into SQL.
- Microsoft Office SharePoint Designer 2007.

TUTORIAL

1. Navigate to the site to which you'd like to add the list. Click on **Site Actions** and then click on **Create**.



2. Under **Custom Lists**, click on **Custom List**.

You may also choose to create a **Basic Page**. You can clean up the page as desired, adding new or removing existing elements. Regardless of which you choose, feel free to add or remove other elements to the page and design it as desired.

3. Enter a Name, a Description, and select whether the list will show in the Quick Launch. When done, click **Create**.

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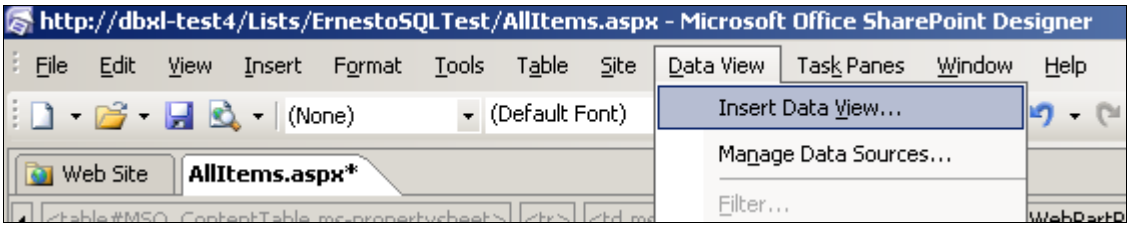
4. Open this newly created SharePoint page in SharePoint Designer by selecting **File > Edit with SharePoint Designer** in Internet Explorer.

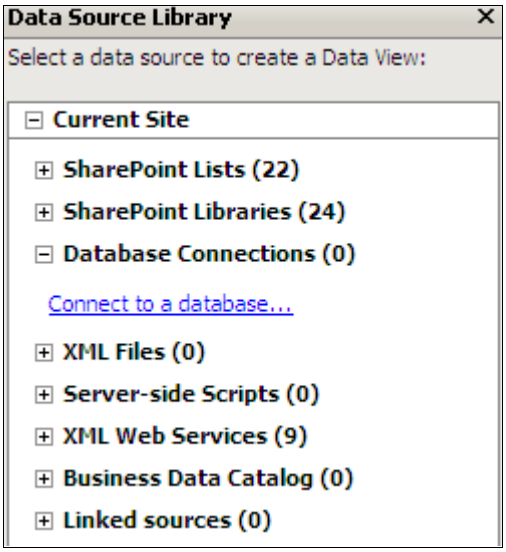
You can also directly open it by clicking **Open** icon in SharePoint Designer and entering the URL to your SharePoint library URL (*http://<servername>/Lists/<listname>/AllItems.aspx*).

5. Click on the Web Part zone that you want to hold the list of forms and click on **Data View** -> **Insert Data View.**



6. A new Web Part appears on your page that says "Click a data source in the Data Source Library, and then click Show Data." If the Data Source Library is not visible click on **Task Panes** -> **Data Source Libraries**.

7. Under Database Connections click on **Connect to a database.** Click **Configure Database Connection**.



8. Type in the information required to connect to your database. This will vary according to your scenario; consult your system administrator if you need assistance when connecting to the database. The **Server Name** is the name of your SQL Server, the connection method required to connect to your database, and then click **Next**. Under **Authentication** select the method you prefer to connect to your database. The first method sends the information in clear text. The second method (Single Sign-On) provides enhanced security, but does take some configuring beforehand. You may choose to use SharePoint's Single-Sign On technology for authentication, which requires the SharePoint site to use Kerberos Authentication.

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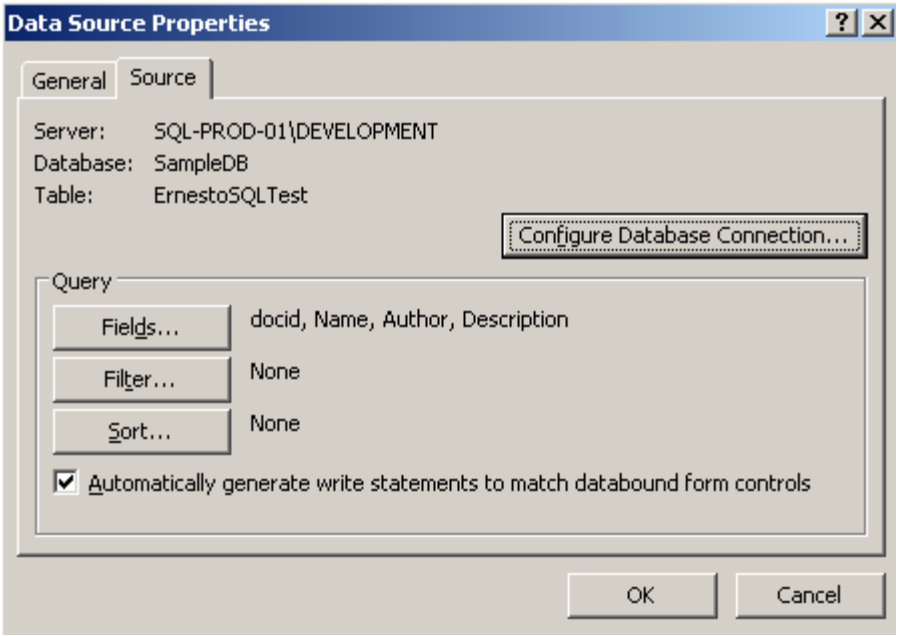
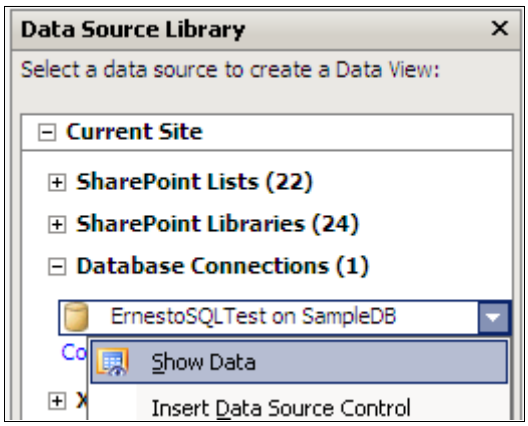
9. Select the Database and then the table or view that contains the required information to connect to your form and finish the wizard.



The one item required to link to your form is the DocID (included amongst the fields listed above). Make sure you have chosen to map this information to a column in your target table. For more information on Database Mapping click here.

Note that this final screen also allows you to set filtering and sorting, if desired.

10. Next, click on the drop-down list on the newly created connection and click on **Show Data**.



11. Click on **Insert Selected Fields as** -> **Multiple Item View**. You can also grab the Row group and drag it into the page.

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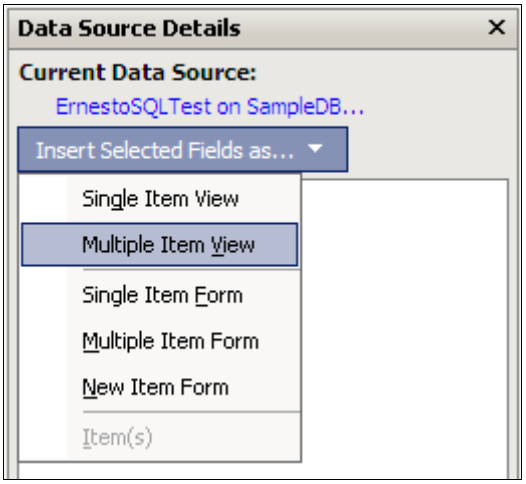

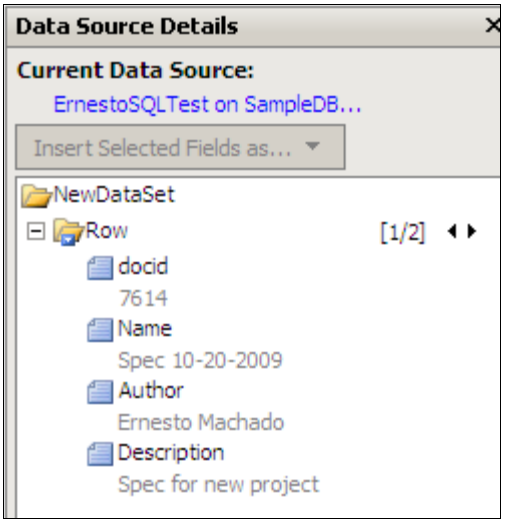

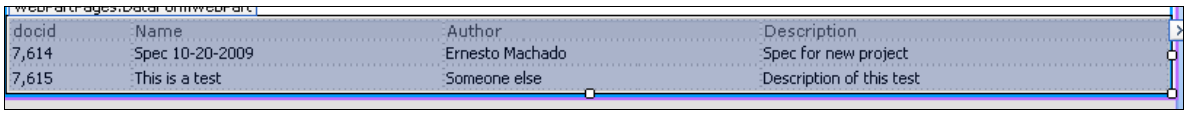

12. Right-click on the cell you want people to click on to open the form and select **Hyperlink**.

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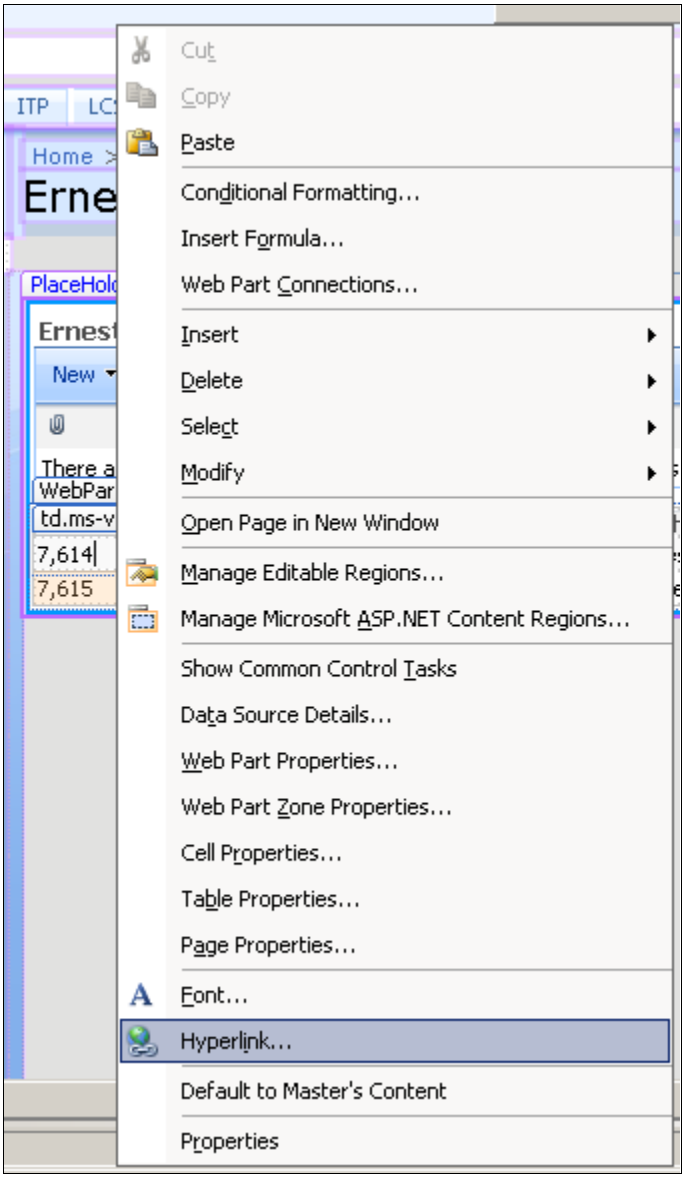

In the example below I have chosen to use the Field {@DocID} as the title of the link a person will click on in order to open the form. Anything in the format {@<field>} is considered a token. These are place holders that will be replaced with the proper data for a given row. You can access these by clicking on the fx button next to the **Text to display** and **Address** line. The Address of any form will be *http(s)://ServerName/QdabraWebService/Documents/{@DocID}/form.xml*. The buttons labeled fx can be used to access these parameters {@Username} & {@DocID}.

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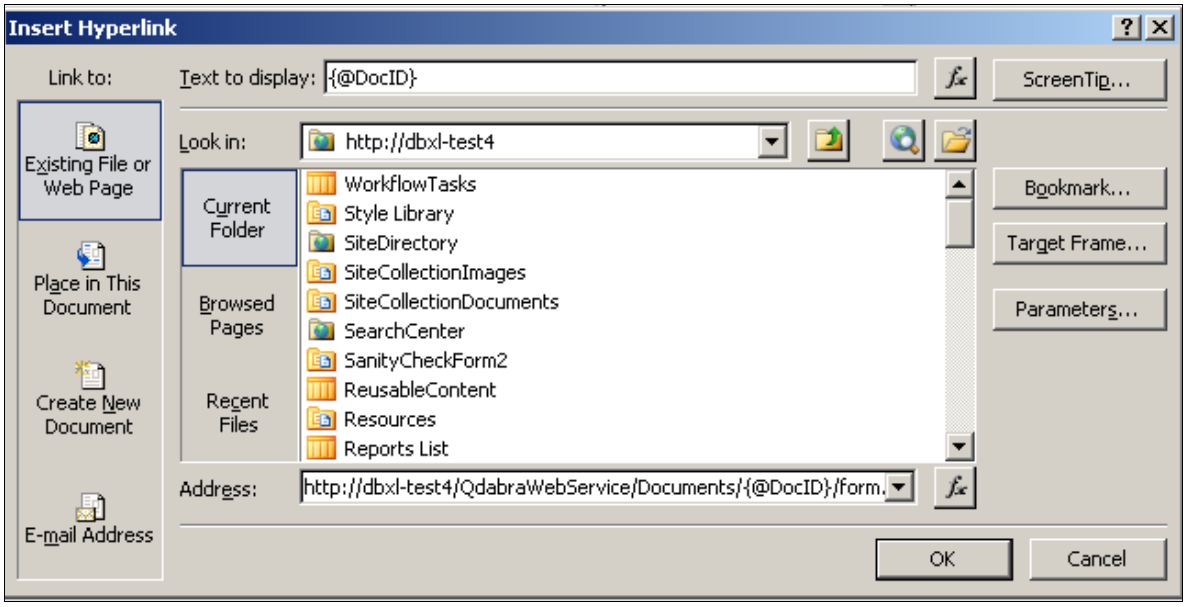
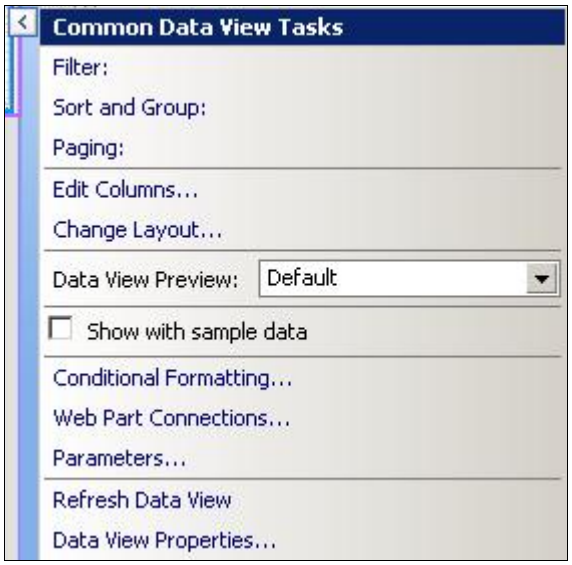


13. Click OK after setting the Text to Display and the Address (URL). Save the page in SharePoint Designer. You can now open the list in Internet Explorer to see your changes.

Many other items can be configured like Sorting, Grouping, and Paging though the **Common Data View Tasks**.



You now have access to your DBXL InfoPath forms on SharePoint!

RELATED DOCUMENTATION

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The disadvantage of the method above is that it requires a SQL Mapping and assumes that this database mapping is working perfectly. Please read the document called Create a SharePoint Data View that uses GetListItems to access DBXL forms for information on an alternative method.

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