

SYNC PDF FILES USING ONEDRIVE TO A SHAREPOINT LIBRARY

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This documentation requires installation of the following applications on your cloud server:

- [DBXL v3.1](#)
- **Qdabra's PDF Rendering Service** for generating PDF copies of forms that are submitted to the Database Accelerator (DBXL).

This guide assumes that your form is configured to submit documents to a DocType in DBXL (Database Accelerator). If you do not have one yet, you may choose an approach from the following guides below that best suits your scenario:

- [Qdabra DBXL Training - Module 3 - Event Receiver](#)
 - [SharePoint OnPrem \(2007, 2010 and 2013\)](#)
 - [SharePoint online \(Office365\)](#)
- [Qdabra DBXL Training - Module 5 - Connectivity for the Cloud \(Anonymous Web Service\)](#)

If you use the Event Receiver, you do not need to modify your InfoPath form to include a data connection that submits to DBXL's Web Service. The InfoPath form template submits to a SharePoint form library, and the Event Receiver maps those forms to DBXL. This is great if you have lots of forms that need to submit to DBXL – it saves you so much time since all you need to do is submit the form to your SharePoint Library and let the EventReceiver do the work for you.

On the other hand, the Anonymous Web Service allows usage of Submit and Query web service for Cloud Platforms/Services – where SharePoint is on a different server/domain from Azure (which is a standalone server).

Note that the regular SubmitDocument Web Service does not work for Cloud Platforms/Services. Also, OneDrive for Business 2013 is intended for use with SharePoint 2013, [you can't sync a SharePoint 2010 library to OneDrive for Business 2013](#).

Proceed to the next section below if you already have an InfoPath form with Submit to DBXL logic configured.

Setting up a form to send PDF

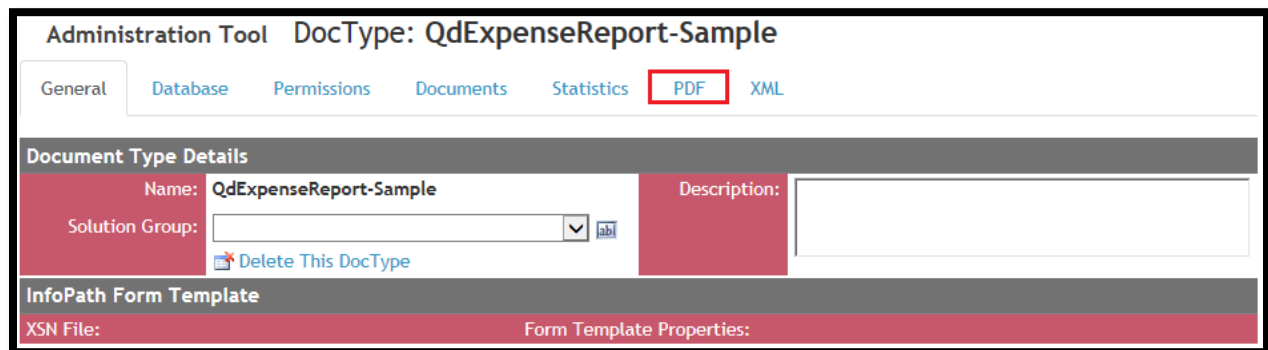
- Open Internet Explorer and access the URL:
<http://<YourServerName>/QdabraWebService/default.htm>
- Once the page opens, click the first link to open up DBXL Administration Tool - Your dashboard to manage DBXL.



- Expand the Uncategorized forms section and click on the QdExpenseReport-Sample link to open up the document type – we will use this default sample form for this guide.



- At the Document Type configuration page, click the PDF tab:



- Once the form opens, indicate a mapping name desired – this is optional but helps distinguish mappings if you have multiple forms to map for PDF rendering.
- Select a View to be printed in PDF.
- Specifying when to trigger PDF rendering.
- Provide a PDF file name that is dynamically based on certain fields from the form provides distinctness. It is best to use a formula which best describes the PDF file, in our case, let us use the formula:

```
concat('Expense Report - ', /my:expenseReport/my:employee/my:name, ' - ',  
/my:expenseReport/my:expenseCode)
```

Notice that the formula concatenates the Title of the form, Employee Name, and Expense Code.

- Enter an Archival Location.

Aside from customizing the PDF File Name, another brilliant feature we can use to help keep our PDF files well organized and manageable is by using folders. What's great about this is that Qdabra's PDF Rendering Service allows us to dynamically create a distinctive folder whenever we generate a PDF.

We may use a static value for the Archival Location, or an expression similar to formula below to allow dynamic creation of folders based on the specified Employee Name.

```
concat('C:\PDF Uploads\SharePoint\DBXL Training - PDF\  
/my:expenseReport/my:employee/my:name)
```

Note that the archival location points to the server where DBXL is installed.



- If you use an expression for the folder location, click the Is Expression checkbox underneath. When done, your PDF Configuration should look similar to this:

Mapping Basic info			
Mapping Source DocType:	Type:	View:	Mapping Name (recommended):
QdExpenseReport-Sample	PDF	View 1	PDF_QdExpenseReport

Rendering Process		
Rendering is initiated when:	What Action take on the rendered PDF:	PDF Naming:
☒ When a new document is submitted ☒ When an existing is modified Additional Condition:	☐ Save as QdFile and send Email with link ☒ Send Email with Attachment	Naming Expression: ne, ' - ', /my:expenseReport/my:expenseCode) Archival location: /my:expenseReport/my:employee/my:name) ☒ XPath Expression

- When done, click the Save button as shown above.

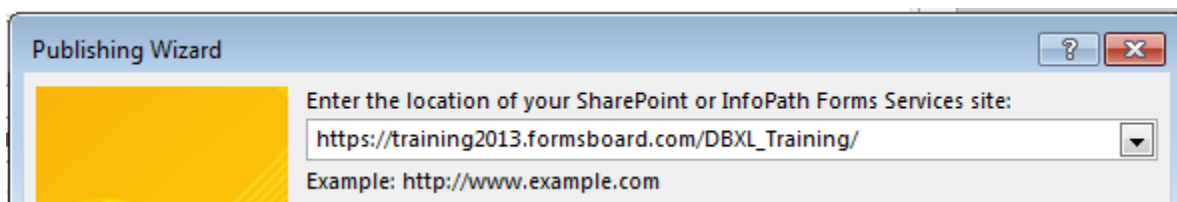
Publish the form to SharePoint

As mentioned previously in this guide, your form should be able to submit documents to the target doctype in DBXL. Please publish your form to the intended SharePoint site if you already have one configured and proceed to the next section, if not, kindly follow the steps below:

Since we are moving on to Cloud technology, using the [EventReceiver](#) method is pretty straight forward, less complex, and saves more time.

After configuring the EventReceiver on your SharePoint site, publish the target form to your SharePoint site as a Form Library.

- Click the **General Tab**.
- Click the download link to download the template.
- Right click and open in design mode.
- Save the InfoPath Form under the name **QdExpenseReport-Sample**.
- Click **File > Publish > SharePoint Server**.
- Enter the location of your SharePoint URL.



Publishing Wizard

Enter the location of your SharePoint or InfoPath Forms Services site:

Example: <http://www.example.com>

- Click **Next**.
- Select Form Library and click **Next**.

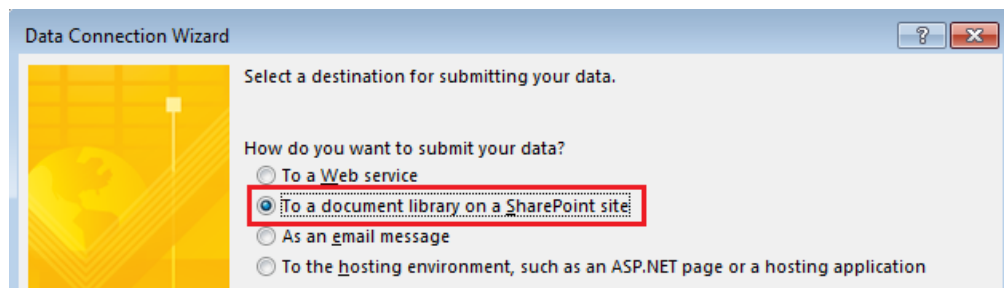


- Select **Create a new form library**.
- Click **Next**.
- Specify a name for the library such as: **QdExpenseReport-Sample**
- **Optional**: Select fields to be promoted as columns for the target library.
- Click **Next**.
- Click **Publish**.

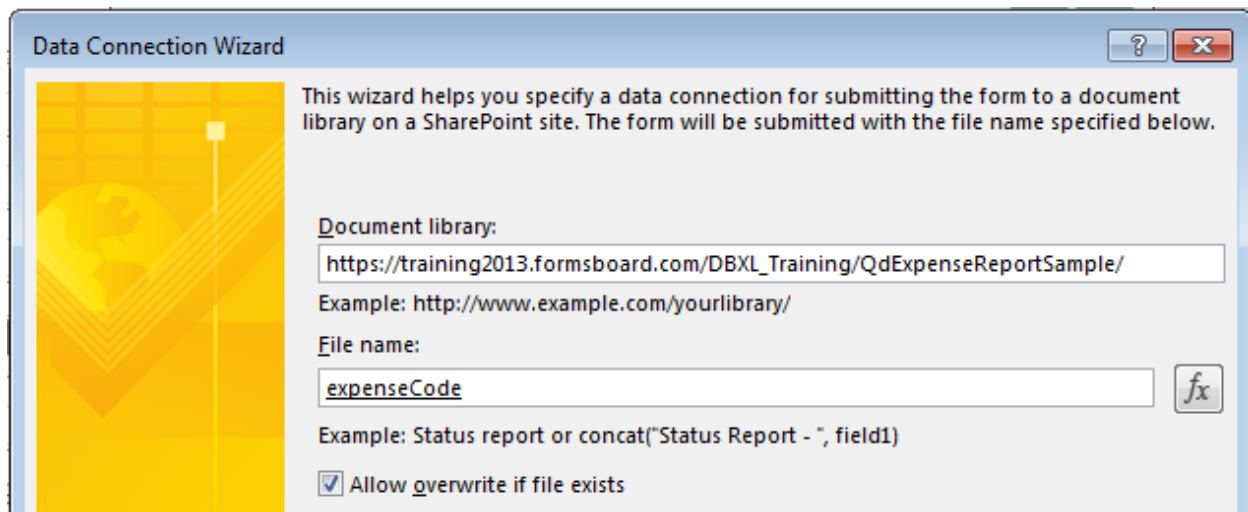
This should take a minute or two to publish your form to the SharePoint site you have indicated.

After the form has been published, add a data connection that submits data to this library.

- Back on the form, click Data Tab.
- Remove the existing DBXL Submit data connection.
- Click **Add** and create data connection that **Submits data** to a **SharePoint Library**.



- Click **Next**.
- Specify the URL for the target library:



- For this guide, let us use the **expenseCode** field as the File Name for every submit occasion – feel free to modify this later on if you wish to use a more distinctive or unique File Name.
- Republish the form to the library.



Configure EventReceiver to submit to your DBXL instance

On SharePoint 2013, click Library tab > Library Settings > DBXL Settings. For O365, DBXL Settings should be available on the ribbon under the Library tab.

Follow the configuration below:

DBXL Service

Enter the configuration details.

If the Conditional Submit expression is blank or evaluates as true, the document will be submitted to DBXL.

If the Conditional Submit expression evaluates as false, it will be deleted from DBXL if it was previously submitted.

If the document is deleted from the SharePoint library, the Conditional Delete is evaluated. If the expression is blank or evaluates as true, it will be deleted from DBXL.

DBXL URL

Example: <http://sharepoint.domain.com/QdabraWebService>

DocumentType Name

☐ Ignore DBXL DocID

DocumentType Name Xpath

Note: xpath value overrides DocumentType Name

Conditional Submit

Example: `/my:myFields/my:Final = '1'`

Note: the condition is not validated

Conditional Delete

Example: `/my:myFields/my:Value = '1'`

Document Settings

Document Settings

Name xpath

Example: `/my:myFields/my:CustomerName`

Note: xpaths are not validated

Author xpath

Description xpath

Credentials

The Secure Store application ID provides the credentials which will be used to submit to DBXL.

Secure Store Application ID

Leave blank to use the SharePoint app pool account
(NT AUTHORITY\NETWORK SERVICE)

Notifications

Specify whom to notify when errors occur submitting forms to DBXL.

Email notifications to:



Enable DBXL Submit

Enable or disable submitting to DBXL on document updates.

☒ Enable DBXL submit

Content Change Detection!

Submit to DBXL, even if no file change detected.

☐ Force DBXL submit



<http://www.qdabra.com>

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Setting-up One Drive Sync to the SharePoint site

Since the PDF files and folders are created in the server, not everyone may have access to it, but we can upload these files from the server onto a SharePoint Document Library using **OneDrive for Business**.

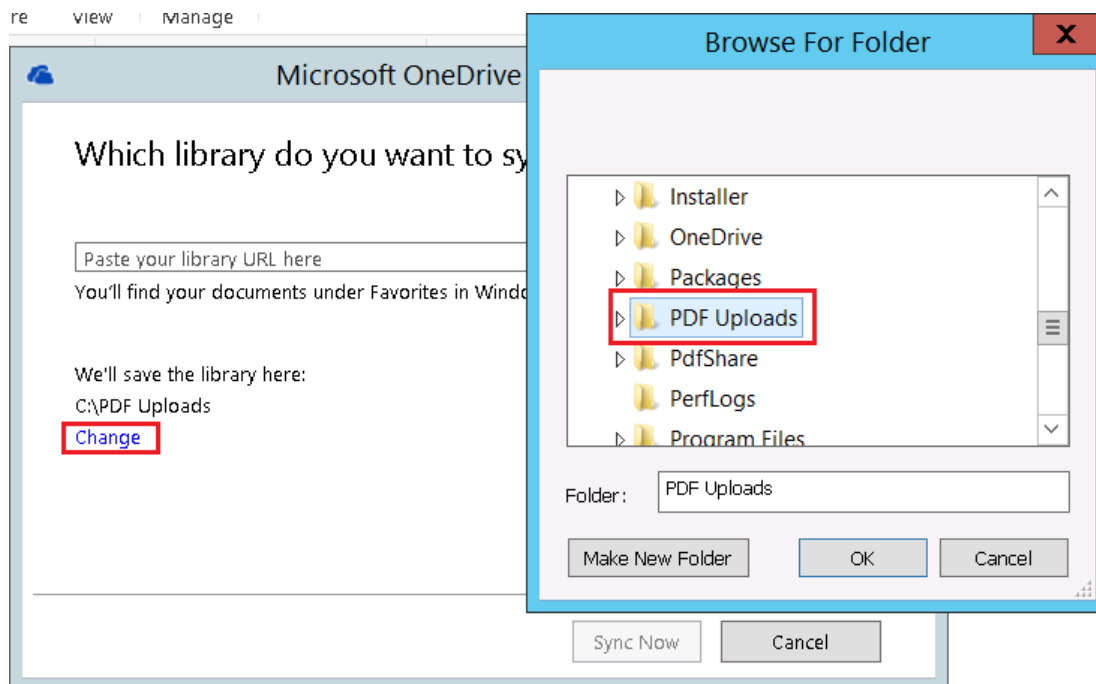
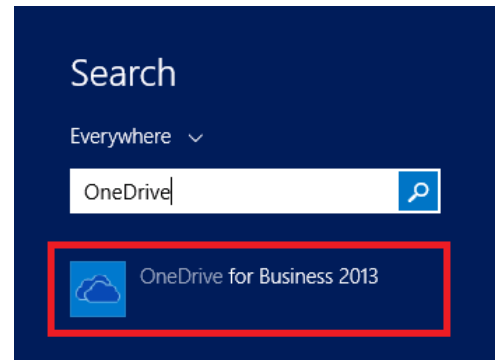
OneDrive for Business lets us store, sync, update and share files from anywhere and work on Office documents with others at the same time.

In this section, we will sync a server folder with a document library on SharePoint 2013.

By default **One Drive for Business** comes preinstalled on Windows 8.1 and Windows 10. If you are using Windows 7, kindly download the app here: <https://support.microsoft.com/en-us/kb/2903984>

Perform the steps below once you have verified that **One Drive for Business** is installed on your local machine.

- On your Server, create a folder named **"PDF Upload"** under **C:**
- After creating the folder, Go to **Start** and search for **One Drive for Business** and open it.
- A **"Microsoft OneDrive for Business"** window will appear.
- Click on **Change** and navigate to the **PDF Uploads** folder under C:\

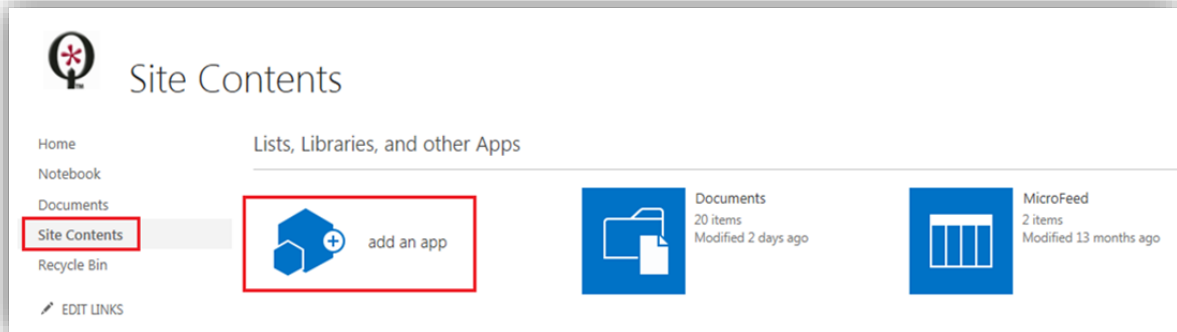


We are setting this up to share PDF's on your O365 account and synch it with your **PDF Uploads** folder.

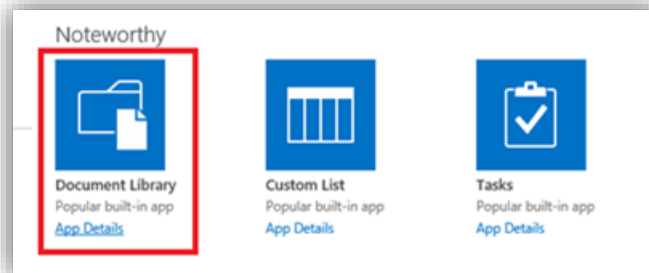
- Click **OK**.
- Before syncing the files, you will need to provide the URL of the SharePoint library (Document Library) where you want to sync and share the PDFs.

First, let's create a **Document Library** on your SharePoint site to sync the PDF's (or provide a URL of an existing library desired)

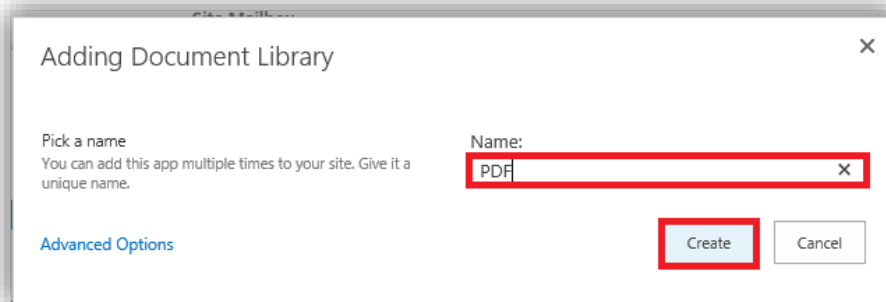
- On the SharePoint site, click on Site Contents and then click on add an app icon.



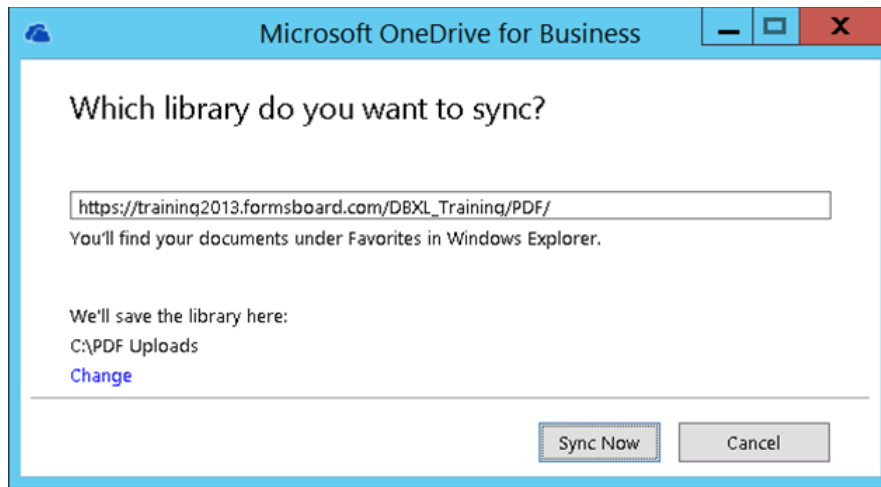
- Select **Document Library** from the *Apps You Can Add*.



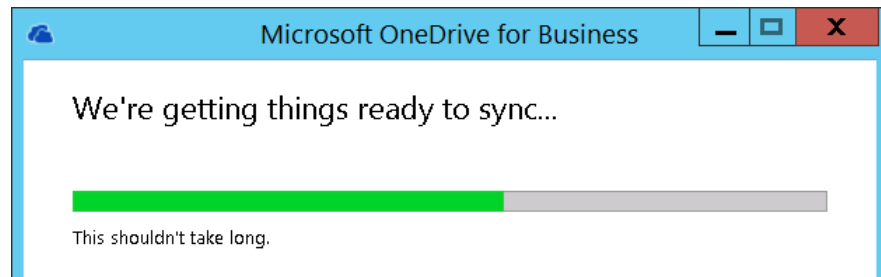
- Enter the name of document library (e.g. PDF) where you want to sync the PDF's.
- Click on **Create**.



- Go back to the “**Microsoft OneDrive for Business**” window and enter the URL to the Document Library that you created to store PDFs.
- Click on **Sync now**.

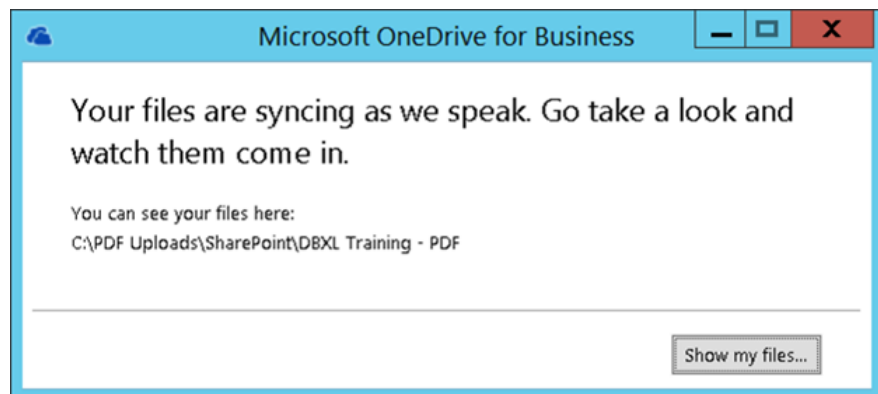


- You will see a window showing a progress bar while it gets ready to sync the files.



- It creates a **SharePoint** folder underneath the **OneDrive** folder in **C:** that you specified earlier. And under SharePoint folder. It creates another folder for the Library that you are synchronizing (**My Test Site – PDF**).

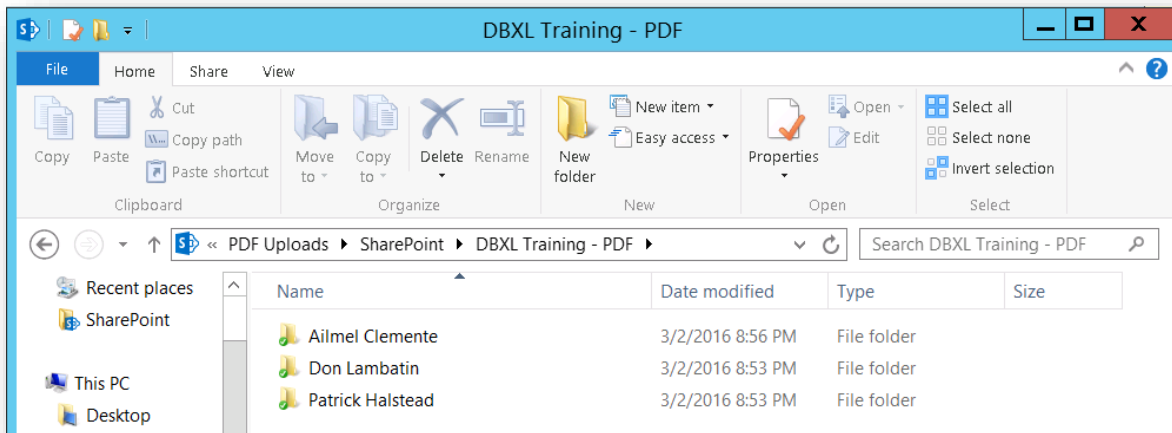
Note: For each library that you want to synchronize, you will have to configure it separately.



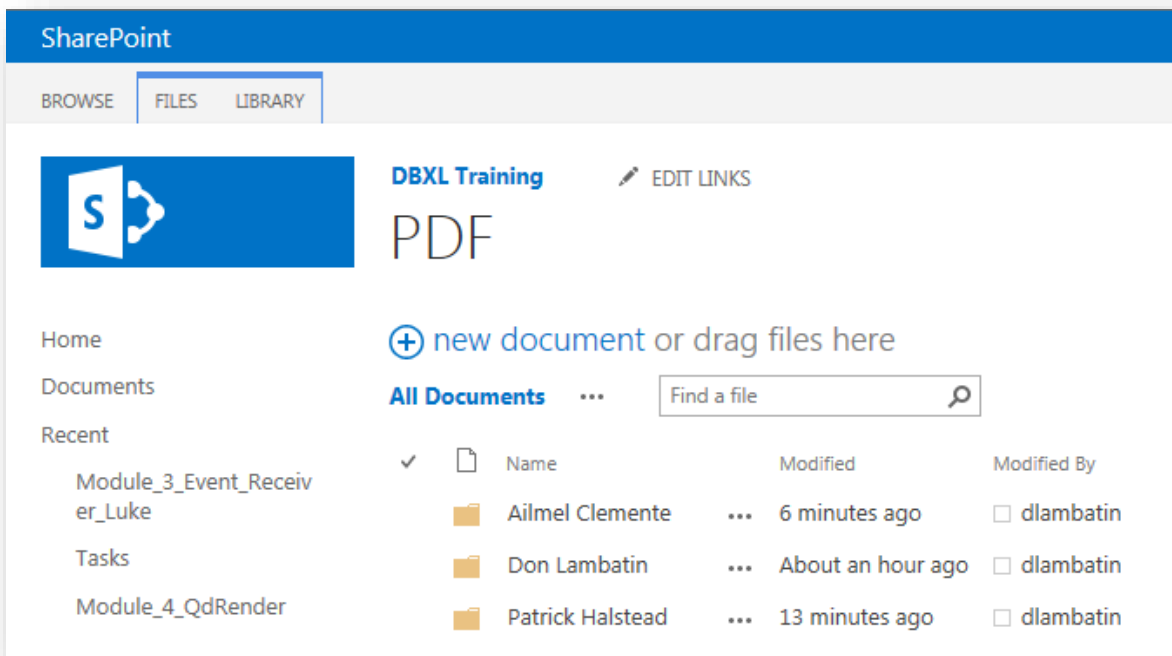
- It creates a **SharePoint** folder underneath the **OneDrive** folder in **C:** that you specified earlier. And under SharePoint folder. It creates another folder for the Library that you are synchronizing (**My Test Site – PDF**).

Note: For each library that you want to synchronize, you will have to configure it separately.

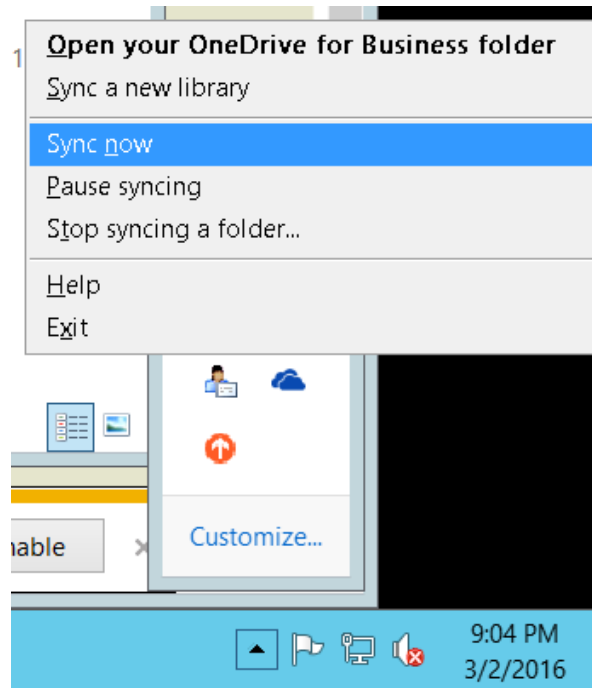
- Initially the folder is empty because it doesn't have any files yet.
- To test that the PDF's will sync with the SharePoint library, submit a couple of forms.



- Go back to your SharePoint library and check if the PDF sync was successful – you might need to refresh your page.



OneDrive automatically syncs your files, but in case you would need to manually sync your PDF files, you may do so by logging in to the server machine > expand the hidden icons section > right click **OneDrive** > click **Sync now**.



This setup should now automatically sync up your PDF Files to a document library on your SharePoint server.



SUPPORT

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