

QDABRA DBXL's XML RENDERING SERVICE CONFIGURATION FOR DBXL v3.1

LAST UPDATED: 12/21/2016

October 26, 2016

OVERVIEW

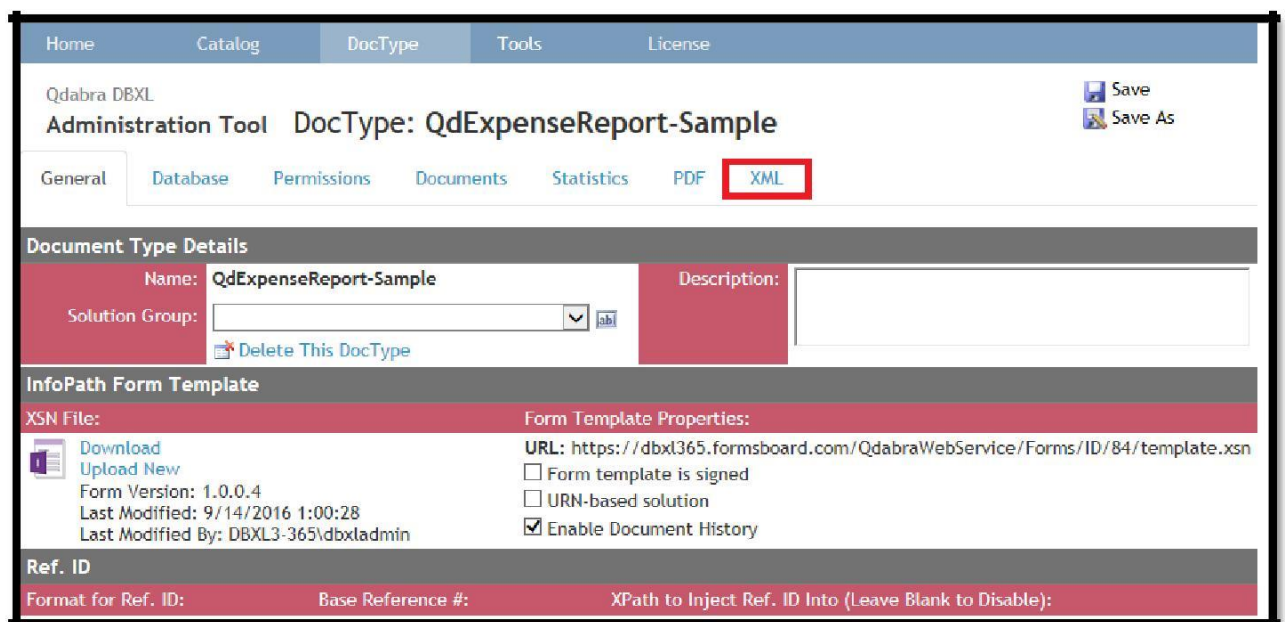
This new feature will create XML files from the SQL data. To keep a loosely coupled design, this service does not support data type nor schema validation. If the created XML doesn't open, the DBXL Admin will have to fix the mapping or restrict the incoming data. This feature leverages logic in the previous PDF Render Mapping feature to send emails (sending XML emails in this feature).

CREATE A MAPPING FOR XML RENDERING

- Proceed to the DBXL Admin Tool and Select the target Document Type for the XML rendering.

ProjectCode	1.0.0.235	2	
QdExpenseReport-Sample	1.0.0.4	28	
QdExpenseReport-Sample2	1.0.0.94	7	

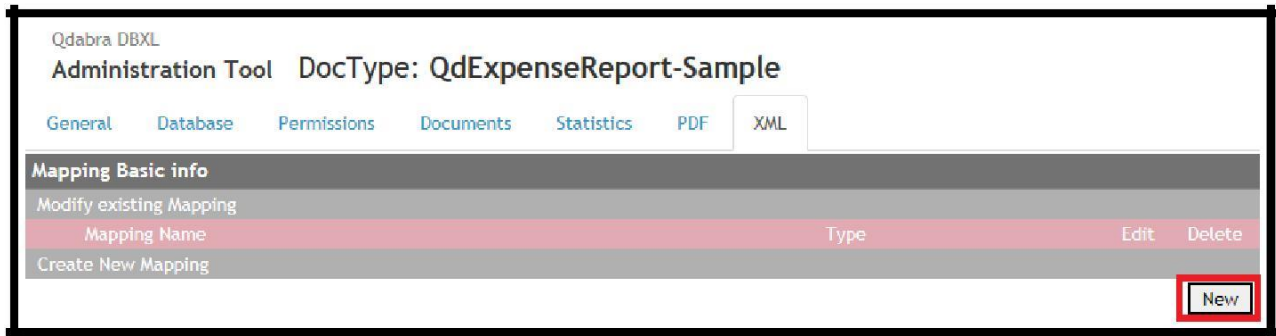
- Click XML Tab to open the **QdRenderMapping** configuration page.



The screenshot shows the 'Administration Tool' interface for 'DocType: QdExpenseReport-Sample'. The 'XML' tab is selected and highlighted with a red box. The 'Document Type Details' section shows the name 'QdExpenseReport-Sample' and a 'Delete This DocType' button. The 'InfoPath Form Template' section displays the XSN file path, form version (1.0.0.4), and last modified date (9/14/2016 1:00:28). The 'Form Template Properties' section includes a URL, checkboxes for 'Form template is signed', 'URN-based solution', and 'Enable Document History' (which is checked). The 'Ref. ID' section shows the format for the reference ID, base reference number, and XPath to inject the reference ID into.



- Click on **New** to create a new mapping (to edit an existing mapping, click the Edit icon for the corresponding mapping you wish to edit)



Qdabra DBXL
Administration Tool DocType: QdExpenseReport-Sample

General Database Permissions Documents Statistics PDF XML

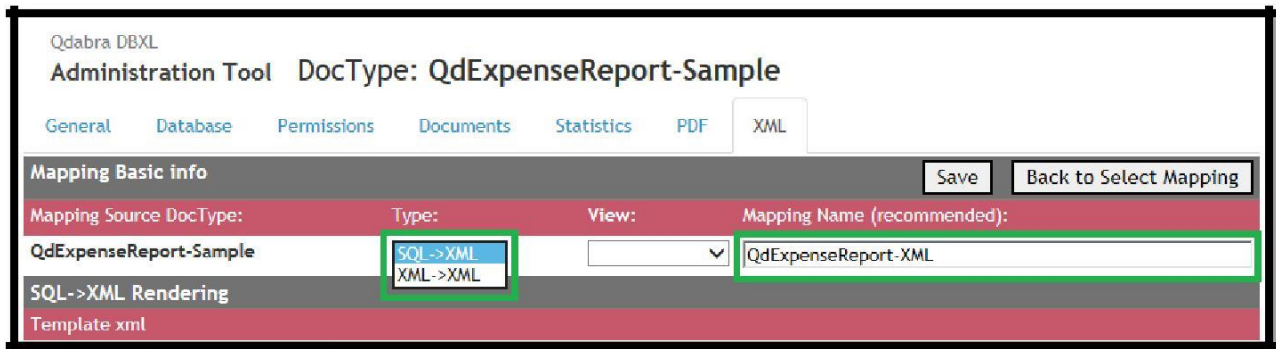
Mapping Basic info

Modify existing Mapping

Mapping Name	Type	Edit	Delete
Create New Mapping			

New

- Once the page loads, indicate a mapping name if desired.
- Select a **Rendering Type** for the mapping. In this case, **SQL > XML** from the dropdown.



Qdabra DBXL
Administration Tool DocType: QdExpenseReport-Sample

General Database Permissions Documents Statistics PDF XML

Mapping Basic info

Save Back to Select Mapping

Mapping Source DocType:	Type:	View:	Mapping Name (recommended):
QdExpenseReport-Sample	SQL->XML XML->XML		QdExpenseReport-XML

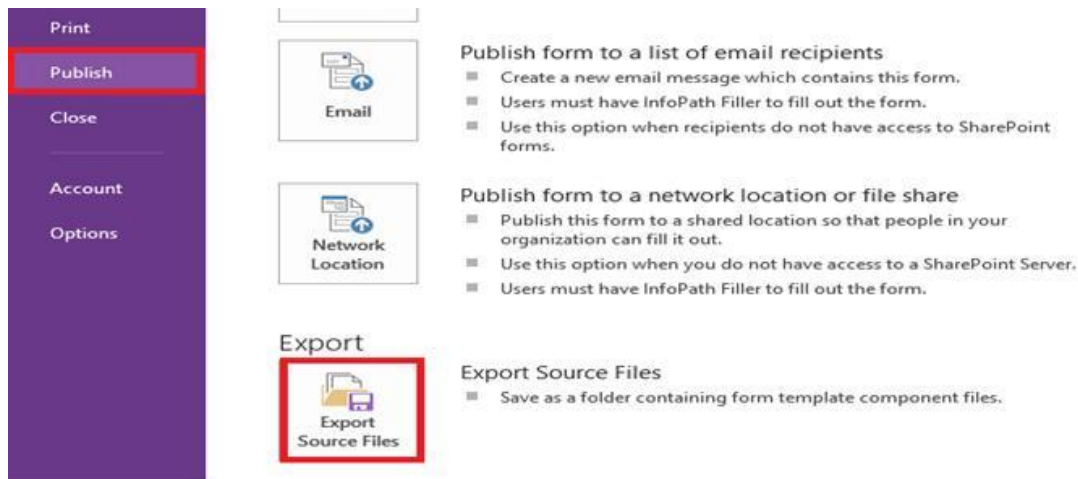
SQL->XML Rendering

Template xml

- Attach the **template xml** to use for generating the xml. To get the template xsn, save the InfoPath form that you chose for Target Document Type on your computer.
- Go to the location where you saved the Form and right-click on it.
- Open the form in InfoPath Design by clicking on **Design**.



- Go to **File** → **Publish**. Click on **Export Source Files**.



- Browse to the location you want to save the folder and give it your Form's name. A new folder will be created containing form template component files. Double-click to open the folder. There you will find the **template.xml** file.

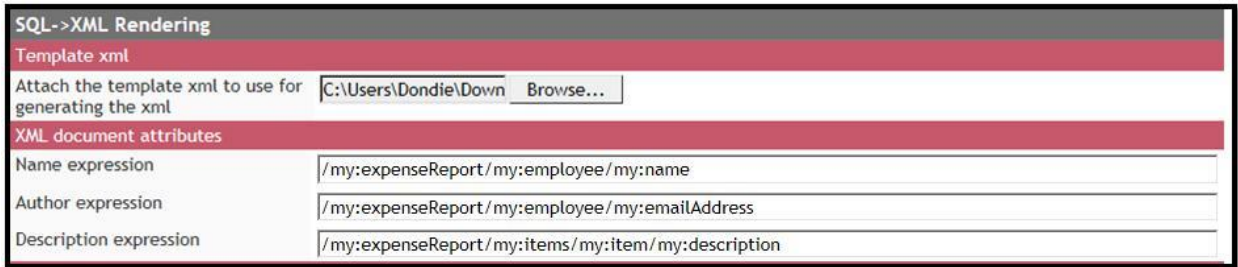
TestForm_Render_XML

Name	Date modified	Type	Size
7365E1C0.png	6/4/2015 2:40 PM	PNG image	18 KB
ADDRESS	6/4/2015 2:40 PM	File	4 KB
ADDRESS.xml	6/4/2015 2:40 PM	Microsoft InfoPat...	4 KB
ADDRESS1.xsd	6/4/2015 2:40 PM	XML Schema File	2 KB
AES.xml	6/4/2015 2:40 PM	Microsoft InfoPat...	1 KB
AES1.xsd	6/4/2015 2:40 PM	XML Schema File	1 KB
E9713FDB.png	6/4/2015 2:40 PM	PNG image	18 KB
header.png	6/4/2015 2:40 PM	PNG image	2 KB
manifest.xsf	6/5/2015 9:22 PM	Microsoft InfoPat...	41 KB
myschema.xsd	6/4/2015 2:40 PM	XML Schema File	10 KB
Print.xsl	6/4/2015 2:40 PM	XSL File	52 KB
Qdabra.Consulting.MXCommands.dll	6/4/2015 2:40 PM	Application extens...	12 KB
QueryScenarios.xml	6/4/2015 2:40 PM	Microsoft InfoPat...	5 KB
QueryScenarios.xsd	6/4/2015 2:40 PM	XML Schema File	7 KB
sampladata.xml	6/4/2015 2:40 PM	Microsoft InfoPat...	7 KB
SharedFormLogic.xml	6/4/2015 2:40 PM	Microsoft InfoPat...	7 KB
SharedFormLogic1.xsd	6/4/2015 2:40 PM	XML Schema File	11 KB
Submit.xml	6/4/2015 3:01 PM	Microsoft InfoPat...	1 KB
template.xml	6/5/2015 9:22 PM	Microsoft InfoPat...	6 KB
upgrade.xsl	6/4/2015 2:40 PM	XSL File	17 KB
view1.xsl	6/4/2015 3:01 PM	XSL File	75 KB

- Now go back to the DBXL Render Mapping page, click on "Click here to attach the template", navigate to the location of the **template.xml** file and attach it.



- Under **XML document attributes** you will find three sections for **Name expression**, **Author expression** and **Description expression** respectively. The users can enter the desired values to each of these fields that they want to display while generating the Xml file.



SQL->XML Rendering

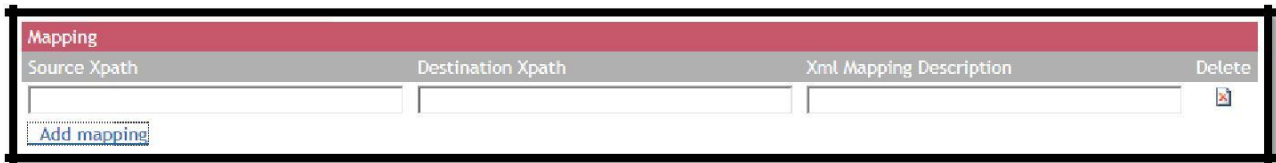
Template xml

Attach the template xml to use for generating the xml

XML document attributes

Name expression	/my:expenseReport/my:employee/my:name
Author expression	/my:expenseReport/my:employee/my:emailAddress
Description expression	/my:expenseReport/my:items/my:item/my:description

- Below this you will find a Repeating table with 3 columns for **Source Xpath**, **Dest Xpath** and **Xml Mapping Description**.
- Click **Add mapping** to enter a new row

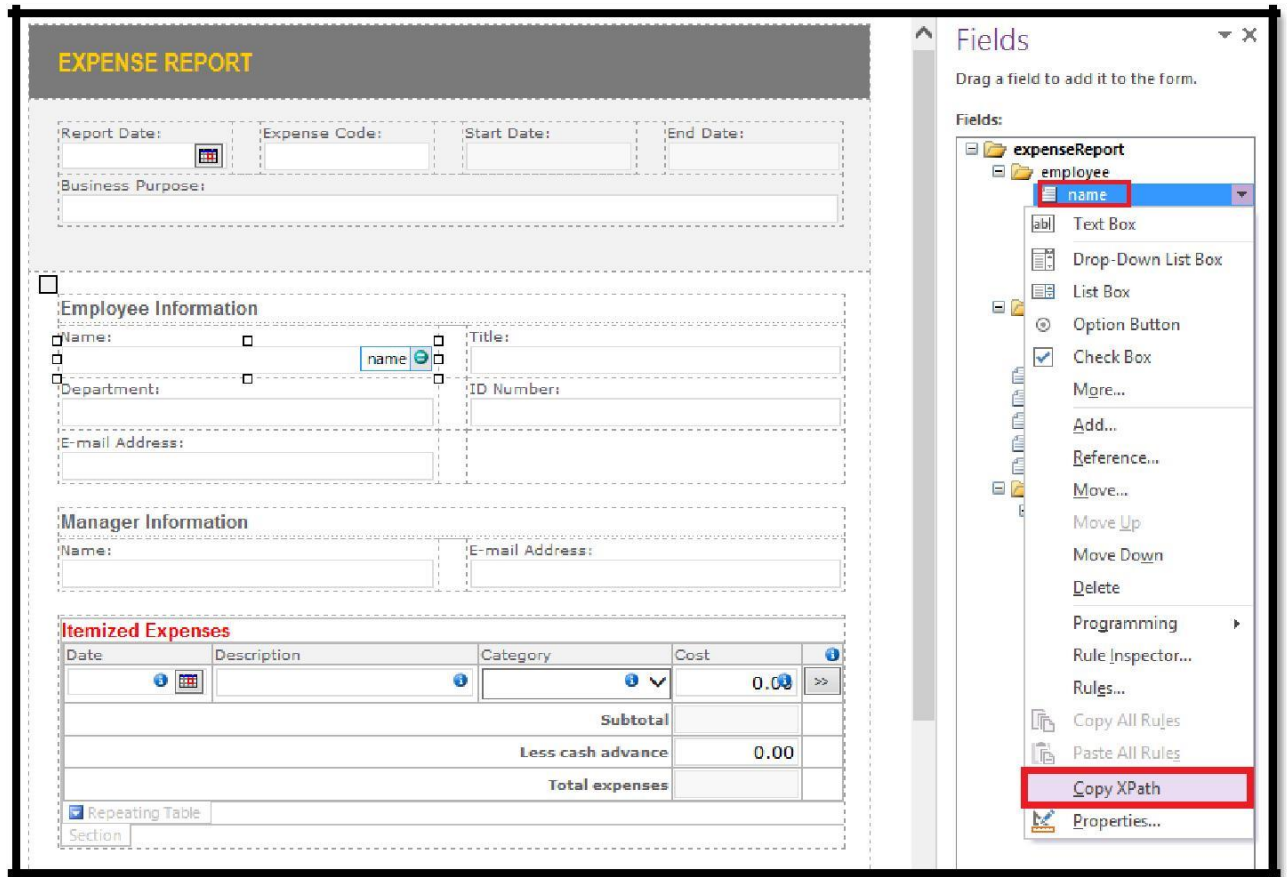


Source Xpath	Destination Xpath	Xml Mapping Description	Delete
			

- For the Source Xpath enter the XPath of the field that you want to include in the XML file.



- For the Dest XPath, open your Infopath form in Design mode and select the field that you want to render from the Fields section. Right-click on the field and click on **"Copy XPath"**.



EXPENSE REPORT

Report Date: Expense Code: Start Date: End Date:

Business Purpose:

☐ **Employee Information**

Name: Title:

Department: ID Number:

E-mail Address:

Manager Information

Name: E-mail Address:

Itemized Expenses

Date	Description	Category	Cost
			0.00
Subtotal			
Less cash advance			0.00
Total expenses			

☐ Repeating Table

Section:

Fields

Drag a field to add it to the form.

Fields:

- expenseReport
 - employee
 - name**

Text Box
Drop-Down List Box
List Box
Option Button
Check Box
More...
Add...
Reference...
Move...
Move Up
Move Down
Delete
Programming
Rule Inspector...
Rules...
Copy All Rules
Paste All Rules
Copy XPath
Properties...



- Go to the DBXL Render Mapping and paste it under Dest Xpath for the desired field, in front of its Source Xpath.
- Write a small description of the Field under **Xml Mapping Description** column to make it understandable.

Mapping			
Source Xpath	Destination Xpath	Xml Mapping Description	Delete
/my:employeeName	/my:expenseReport/my:employee/my:nam	Employee Name	
/my:Identity	/my:expenseReport/my:employee/my:ident	Employee ID	
/my:emailAddress	/my:expenseReport/my:employee/my:emailAddress	Employee Email Address	
/my:jobTitle	/my:expenseReport/my:employee/my:jobTitle	Employee Job Title	
/my:managerName	/my:expenseReport/my:manager/my:managerName	Manager Name	
/my:managerEmail	/my:expenseReport/my:manager/my:managerEmailAddress	Manager Email	
/my:Purpose	/my:expenseReport/my:purpose	Purpose	
Add mapping			

- Expand the **Email settings** section.
- For the “**What Action**” section, check the box before **Send Email with Attachment** to receive the generated XML file attached to the email.

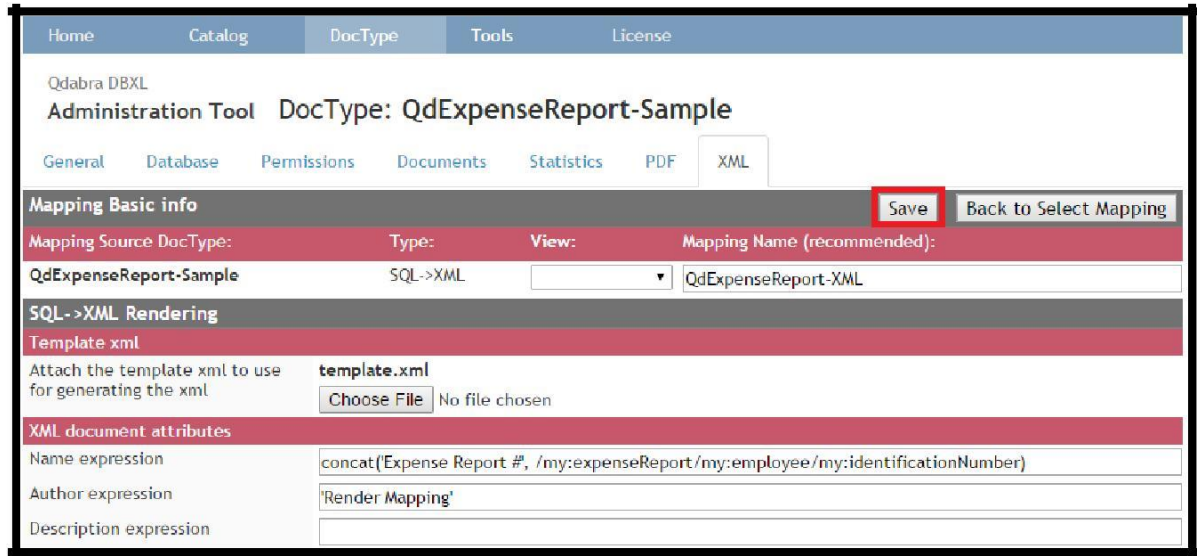
Email settings		
Rendering Process		
Rendering is initiated when:	What Action take on the rendered PDF:	PDF Naming:
☐ When a new document is submitted ☐ When an existing is modified Additional Condition:	☐ Save as PdfFile and send Email with link ☒ Send Email with Attachment	Naming Expression: Archival location:
		☐ XPath Expression

- For the **Email section**, you can write an expression to include a Subject line that you want to include with the email. Check the box for ‘**XPath Expression**’ if the Subject is an Expression.
- Under **From Address**, select **Use Static Values** and enter the email address that you want to use for sending out the XML rendering of the form.
- Under **To Addresses** enter email address of the people you want to send the XML file to. You can also copy an XPath of an email field from the form to send the emails using dynamic values from the form.
- Similarly, add email addresses to CC and BCC others to the emails.

Rendering Contents			
Email Subject:		Body:	
☐ Static Text ☒ XPath Expression		☒ View ☐ HTML ☐ XPath Expression ☐ Plain Text	
concat(Expense Report - ', /my:expenseReport/my:emplo			
Email Address			
	Type:	Email Address: (Xpath for Dynamic):	Display Name (Optional, Xpath for Dynamic):
From Address	static	notifications@qdabra.com	
To Address	dynamic	/my:expenseReport/my:manager/my:manager	
CC Address	static	Add CC Email Address	
BCC Address	static	Add BCC Email Address	



- Click on **Save** to save the render mapping of the form.



Qdabra DBXL Administration Tool DocType: QdExpenseReport-Sample

General Database Permissions Documents Statistics PDF XML

Mapping Basic info Save Back to Select Mapping

Mapping Source DocType:	Type:	View:	Mapping Name (recommended):
QdExpenseReport-Sample	SQL->XML		QdExpenseReport-XML

SQL->XML Rendering

Template xml

Attach the template xml to use for generating the xml **template.xml**
 No file chosen

XML document attributes

Name expression	concat('Expense Report #, /my:expenseReport/my:employee/my:identificationNumber')
Author expression	'Render Mapping'
Description expression	

ADDITIONAL DBXL RENDERING CONFIGURATION

When using the DBXL Rendering Service for XML rendering, the connection string needs to be manually configured in the Qdabra.DbXL.Rendering.exe.config file.

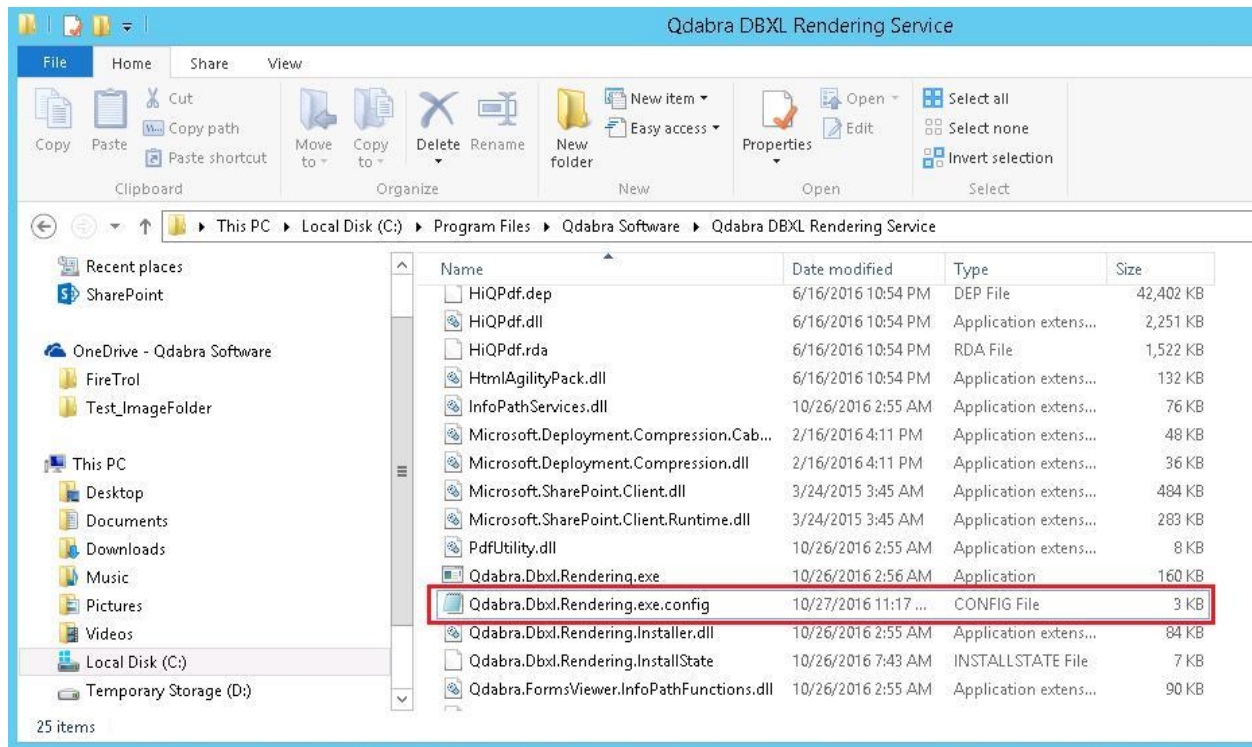
First, open the Qdabra Web Service web config file located in:
 C:\inetpub\wwwroot\QdabraWebService

And write down the Data Source and Database name from this web config file.

```
<?xml version="1.0" encoding="utf-8" ?>
<configuration>
  <systemData>
    <server name="default" connectionString="Data Source=DBXL3-365\SQLEXPRESS;Initial Catalog=;Integrated Security=True" />
    <!-- Define additional servers to easily switch database aliases from different environments -->
    <!-- NOTE: server name attribute must be unique within this list -->
    <!-- EXAMPLE: -->
    <!--<server name="PRODUCTIONSERVER" connectionString="Integrated Security=SSPI;data source=RemoteMachine\SqSqlServer"/>-->
    <!--<server name="TESTSERVER" connectionString="Integrated Security=SSPI;data source=RemoteMachine\SqSqlServer"/>-->
  </systemData>
  <systemData>
    <!-- DBXLDB is a predefined alias and does not need to be declared -->
    <!-- NOTE: alias attribute must be unique within this list -->
    <database alias="QdabraSamples" name="QdabraUtilityCurrent" server="default" />
    <!-- EXAMPLE: -->
    <!--<database alias="NameUsedInEnumDBCalls" name="ActualDatabaseNameOn_RemoteMachine_SqSqlServer" server="TESTSERVER"/>-->
  </systemData>
</configuration>
```

Now open the Qdabra.DbXL.Rendering.exe.config. By default the file should be located in:
 C:\Program Files\Qdabra Software\Qdabra DBXL Rendering Service

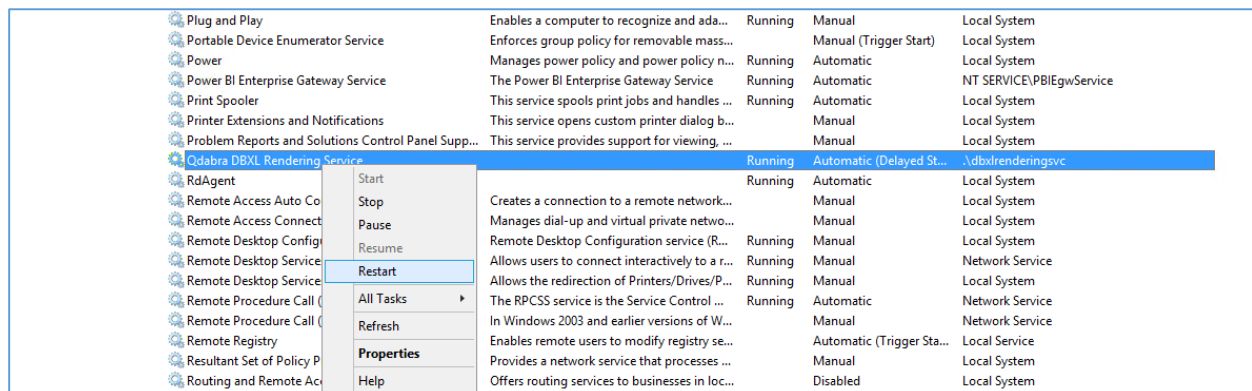




Open this file in notepad. Comment out the original connection string and add a new one where Data Source and the Initial Catalog parameters are the Data Source and Database Name previously written down from the web config. This connection string enables the connectivity between the DBXL Rendering Service and the Database.

```
<connectionString> <clear />
  <!--<add name="DBXLUtility" providerName="System.Data.SqlClient"
connectionString="Data Source=SQLSERVER;Initial Catalog=QdabraUtility;Integrated
Security=TRUE" />-->
  <add name="DBXLUtility" providerName="System.Data.SqlClient" connectionString="Data
Source=DBXL3-365\SQLEXPRESS;Initial Catalog=QdabraUtilityCurrent;Integrated
Security=TRUE" />
</connectionStrings>
```

After adding the connection string, go to Services and restart the Qdabra DBXL Rendering Service.



SAMPLE TEST FOR XML RENDERING

- This is the sample test SQL insert that has been used for testing XML Rendering service on DBXL test site.

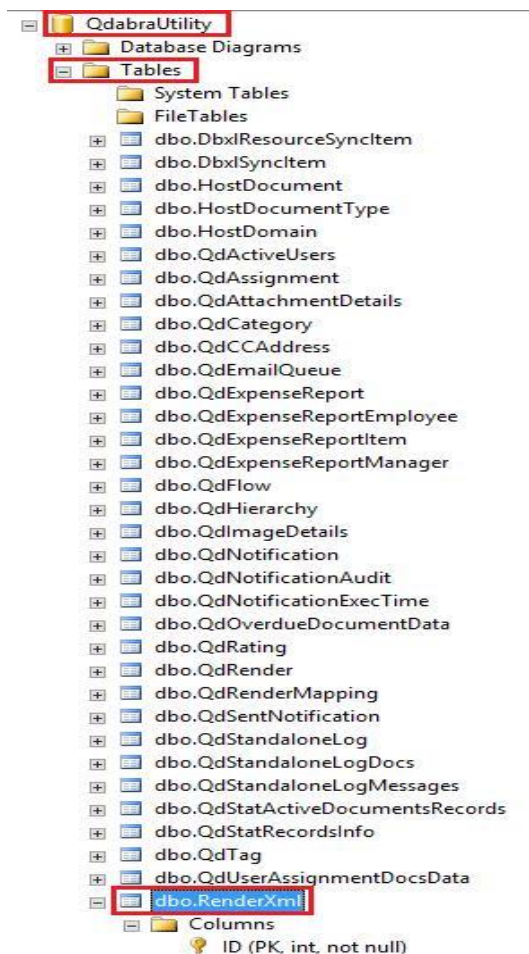


```
SQLQuery12.sql - D:\...65\sqladmin (75))* X
USE [QdabraUtility]
GO
INSERT INTO [dbo].[RenderXml]
    ([DocTypeName]
    ,[SourceRenderMapping]
    ,[DataXml]
    ,[TargetRendering]
    ,[Processed])
VALUES
    ('QdExpenseReport-Sample'
    ,22822,N'
    <ExpenseReport>
      <employeeName>John Doe</employeeName>
      <Identity>007</Identity>
      <emailAddress>john.doe@qdabra.com</emailAddress>
      <managerName>Don Lambatin</managerName>
      <managerEmail>don.lambatin@qdabra.com</managerEmail>
      <jobTitle>QAE and Support Lead</jobTitle>
    </ExpenseReport>'
    ,NULL
    ,0)
GO
```

- To test the XML Rendering open the SQL Server Management Studio on the server where you have DBXL installed.



- Connect to the SQL database and expand **Qdabra Utility** folder. Expand **Tables** folder and scroll down till you find **dbo.Render.Xml**.

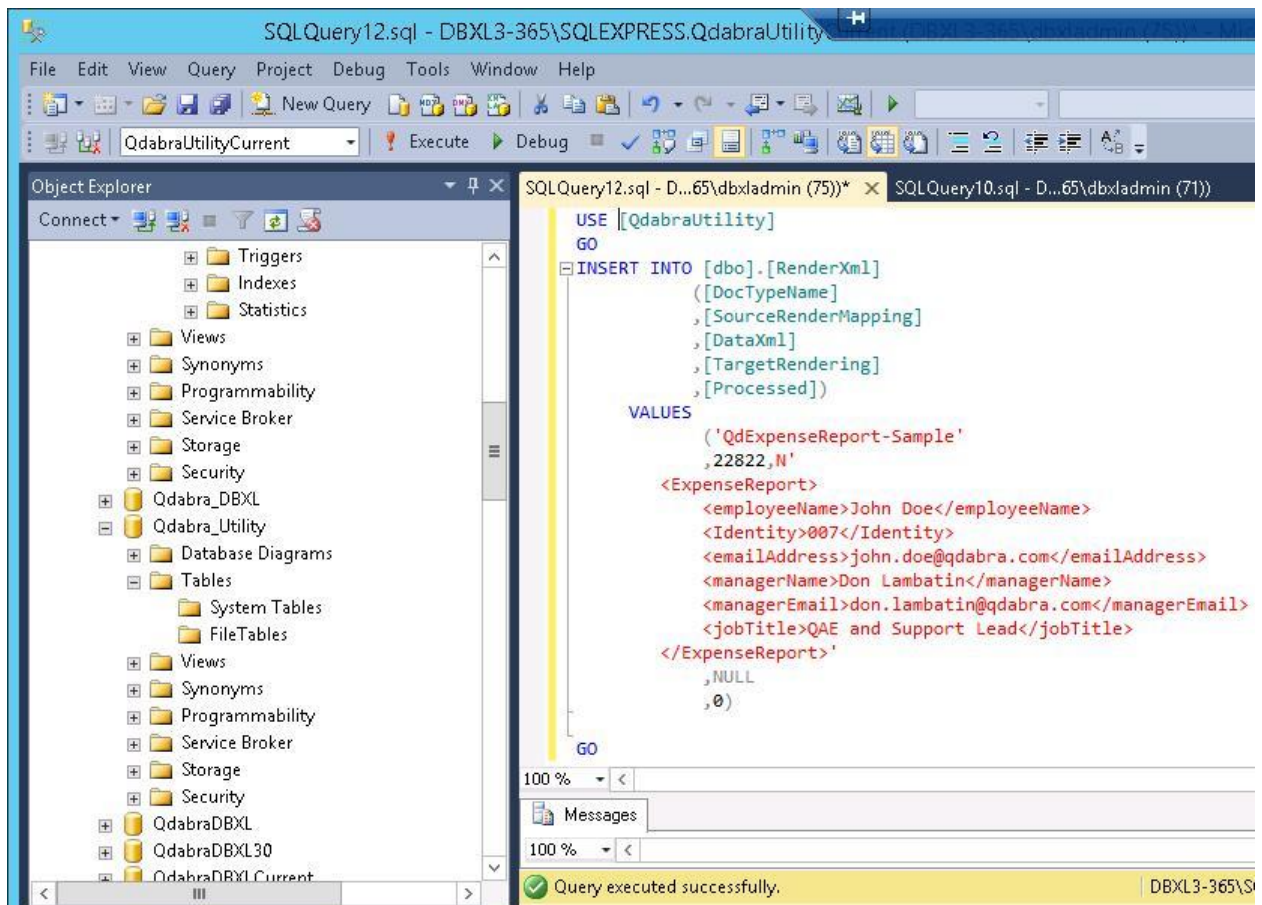


- Create a new query like the one above and you can give hard-coded values for the Form fields that you want to include in the XML file.

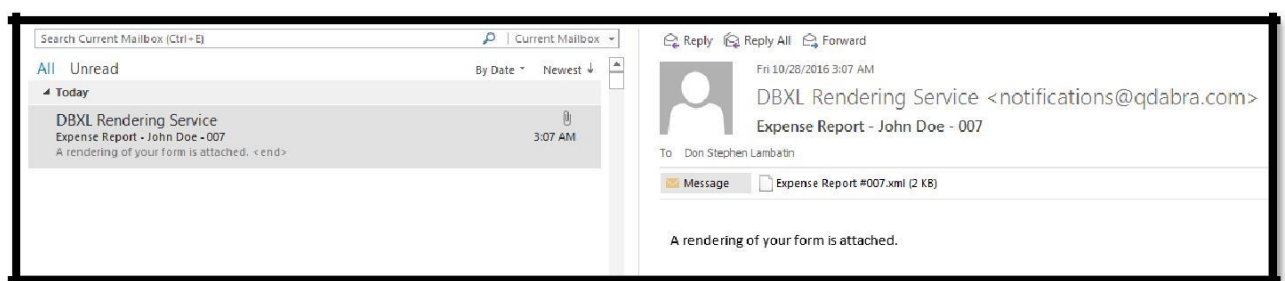
Column	Content
DocTypeName	QdExpenseReport-Sample
SourceRenderMapping	22822 (DocId number of DBXL Render Mapping for XML – this can be acquired from the QdRenderMapping doctype. Go to Catalog > expand System Document Types > QdRenderMapping > Documents > locate XML mapping name and identify associated Doc ID)
DataXml	XML document or string of characters; Fields that have to be Rendered + Hard-coded value (eg. <employeeName>Don Lambatin</employeeName>)
TargetRendering	NULL
Processed	0



- Once you have entered all the values, **Execute** the SQL Query.



- You will receive an email with the Xml file attached.



Note that the specified dynamic/static value under the To Address at the Email settings section will be the recipient for the XML rendering.



- Double-click on the xml file and the form will open in InfoPath Filler with the hardcoded values that were given in the SQL query (if that doesn't work, open the QdExpenseReport-Sample form in design mode, go to File > Form Options > Preview > select the XML received > run in preview)

EXPENSE REPORT

Report Date:

Expense Code:

Start Date:

End Date:

Business Purpose:

Employee Information

Name:

Title:

Department:

ID Number:

E-mail Address:

Manager Information

Name:

E-mail Address:

Itemized Expenses

Date	Description	Category	Cost	
			0.00	>>
Subtotal			0.00	
Less cash advance			0.00	
Total expenses			0.00	

Item Details



CONTACT INFORMATION

Qdabra Software
218 Main Street, Suite 731, Kirkland, WA 98033

Phone: 877.544.2389
Email: Support@Qdabra.com
Website: <http://www.qdabra.com>
Community: <http://www.infopathdev.com>

