

LAB 2 - SUBMIT REPEATING DATA TO A LIST USING QRULES SUBMITTOSHAREPOINTLIST COMMAND

OVERVIEW

This document details how to use qRules' **SubmitToSharePointList** command to submit repeating data to a list. By using this logic, the Expense Report form will submit to a parent and child list, which will contain the report header and items respectively.

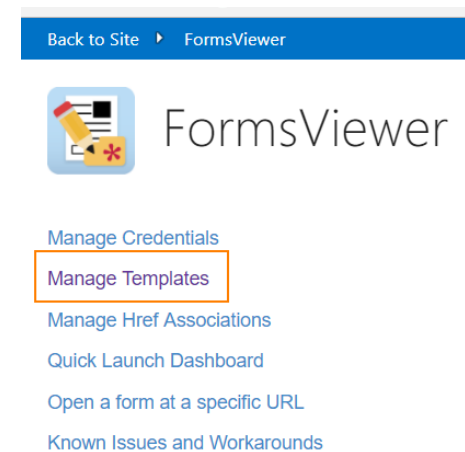
BEFORE YOU START

- Verify that you have created the Expense Report parent and child lists. If not, please review the Expense Report Deployment Guide.pdf and look for the steps to create the lists for Parent (Expense Report) and Child (Expense List Items) using the STP files.

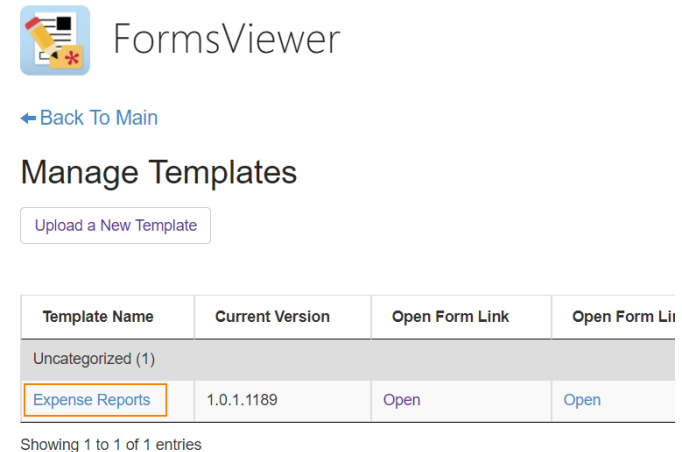
CREATE THE MAPPING

This section will show you how to create the mapping using the built in **Forms Designer** in **FormsViewer**.

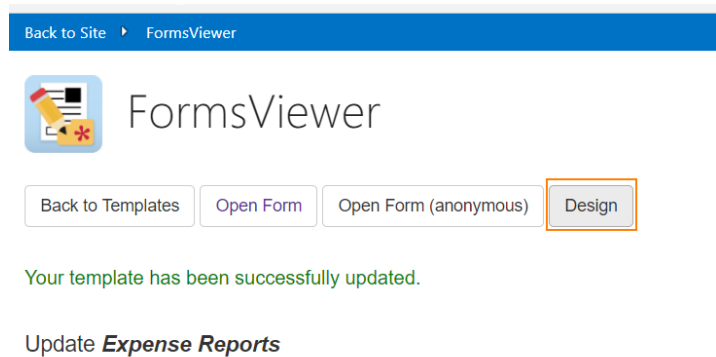
- In the **Site Contents**, click on **FormsViewer > Manage Templates**.



- Locate the Expense Report form template.

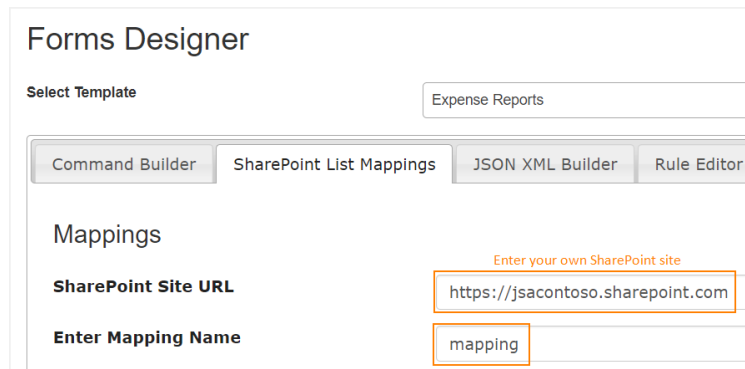


- Click **Design**.

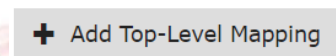


- This will show you the Forms Designer. Enter your **SharePoint site URL** and the **mapping name** under **SharePoint List Mappings** tab:

Important: Please name the mapping as “mapping” as shown in screenshot.

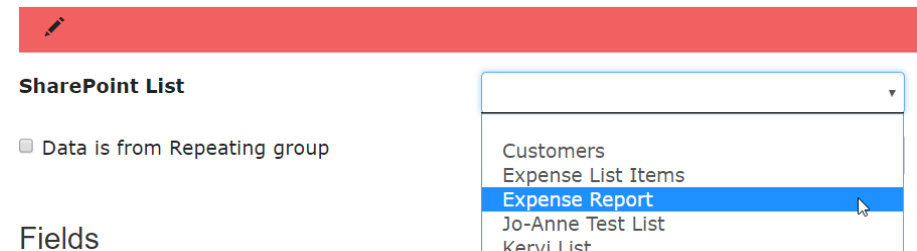


- To add the Expense Report Parent list, click **Add Top-Level Mapping**.



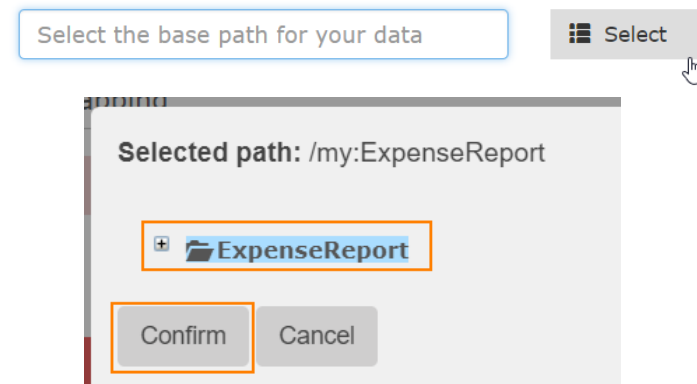
- Select the parent list from the dropdown.

Mapping Definition

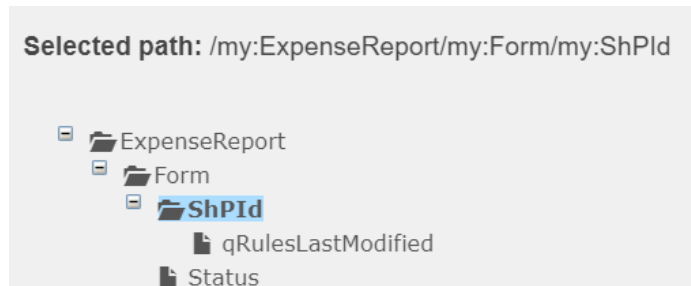


Fields

- Select the base path and click on ExpenseReport as the base path.



- Next, we will be adding the **Form Fields** to be mapped in the parent list. First, select the SharePoint ID (ShPID) in the form's data source.



We are going to use this field for the Expense Report list item id. It doesn't get mapped to a column - on a successful submit, qRules will populate it with the newly created item's id, so we can update our list item from our form.

9. In the SharePoint Column and Options, select **ID**.

Fields

Form Field	SharePoint Column	Options
my:Form/my:ShPIId	ID	ID

10. Map the rest of the fields - these are all from the Expense Report group in the form template schema

Fields

Form Field	SharePoint Column	Options
my:Form/my:ShPIId	ID	ID
my:ExpenseDetails/my:Report/my:ReportName	Title	Plain
my:ExpenseDetails/my:Report/my:ReportDate	Report Date	Plain
my:Resource/my:Employee/my:Name	Resource Name	Plain
my:ExpenseDetails/my:Report/my:Purpose	Purpose	Plain
my:ExpenseDetails/my:Report/my:Total	Total	Plain
my:Form/my:Status	Status	Plain
my:ReportTracking/my:General/my:AssignedTo	Assigned To	Plain
my:ReportTracking/my:General/my:AssignedToEmail	Assigned To Email	Plain
my:ReportTracking/my:General/my:ApprovedBy	Reviewed By	Plain
my:ReportTracking/my:General/my:DateReviewed	Date Reviewed	Plain

11. We are now going to add the child list. Go ahead and select the + button beside Expense Report mapping.

Expense Report ✕ +

Mapping Definition

+ Add Top-Level Mapping

12. Again, select the child SharePoint list name in the dropdown and select the base path. This time, we will use

/my:ExpenseReport/my:ExpenseDetails/my:Items/my:Item

as the base path.

Selected path: /my:ExpenseReport/my:ExpenseDetails/my:Items/my:Item

- ExpenseReport
 - Form
 - Resource
 - ExpenseDetails
 - Report
 - Items
 - Item**
 - ShPid
 - ExpenseDate
 - Category
 - Description
 - MerchantName
 - Files
 - Amount
 - count
 - ReportTracking

Confirm Cancel

Expense List Items ▼ Refresh Columns

my:ExpenseDetails/my:Items/my:Item Select

13. Since this is a repeating group, check this field.

SharePoint List

☒ Data is from Repeating group

14. For the child list, aside from the ShPid, we will add another field which will be pointing to the ID of the parent list. You can see here that I added the **Report ID** as the **Parent List Id**.

Form Field	SharePoint Column	Options
my:ShPid	ID	ID
	Report ID	Parent List Id

15. Add the rest of the fields.

Form Field	SharePoint Column	Options
my:ShPid	ID	ID
my:Description	Report ID	Parent List Id
my:ExpenseDate	Title	Plain
my:Category	Date	Plain
my:Amount	Category	Plain
my:Files	Amount	Plain
../..../my:Form/my:Status	Attachments	Attachment
	Status	Plain

16. Once everything is complete, click Inject Mapping.

Inject Mapping

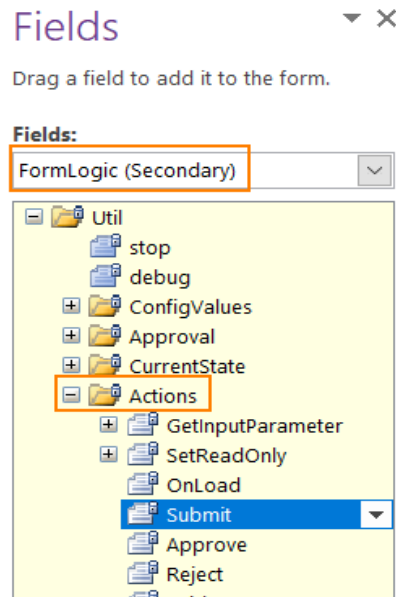
17. Download a copy of the .xsn file with the mapping injected.

Note: Final mapping.xml will also be included in the package. This can be added as additional Data connection (resource file) in the .xsn file.

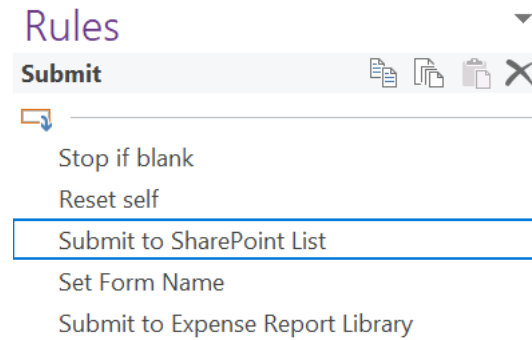
ADD SUBMITOSHAREPOINTLIST COMMAND

1. Download the Expense Report xsn from FormsViewer.
2. Open the **Expense Report – Start.xsn**

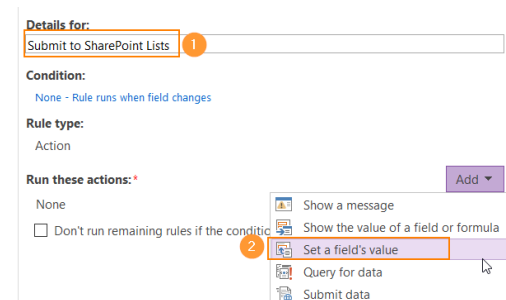
3. In the **FormLogic** data connection, go to **Actions** > **Submit**.



4. We'll add a new rule after the **Reset Self** rule that we will call Submit to SharePoint List.

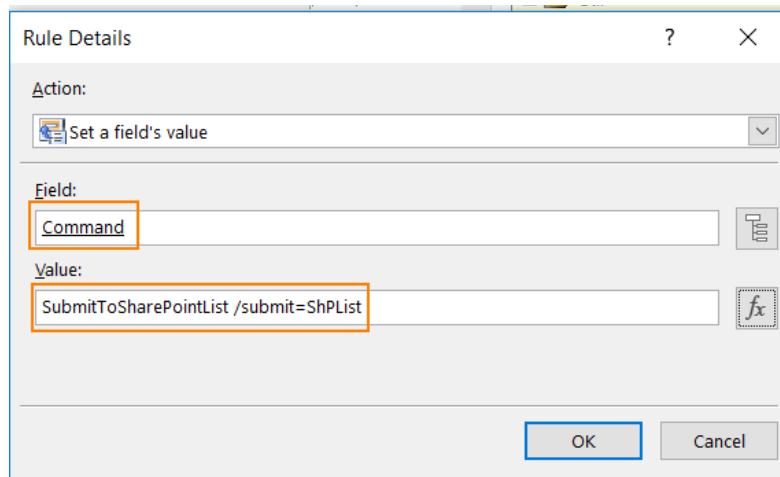
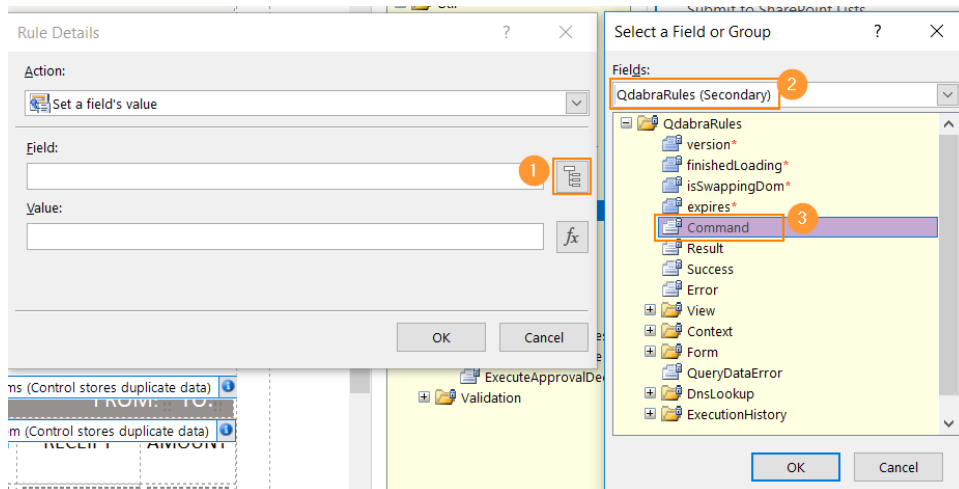


5. Click **New** > **Action**.
6. Add an action to **Set a field's value**.



7. In the Rule details window, select the **Command** field under **QdabraRules** data connection. Then add this as value:

SubmitToSharePointList /submit=ShPList



8. Save the .xsn file and upload in FormsViewer.

TEST YOUR FORM!

Go to **Expense Report** library and click **+New**. Submit a new report and check if the parent and child list now have data.

Sample submission:

Parent List:

Expense Report

[+ new item](#) or [edit this list](#)

All Items

✓	ID	Title	Report Date	Resource Name	Purpose	Total	Status
	1	Expense Report - 2018-03-27 -	2018-03-27	Jo-Anne Alfafara	submitsharepoint	12	Submitted
	2	Expense Report - 2018-03-27 -	2018-03-27	Jo-Anne Alfafara	test	12	Submitted
	3	Expense Report - 2018-03-27 -	2018-03-27	Jo-Anne Alfafara	test	222	Submitted

Child List:

Expense List Items

[+ new item](#) or [edit this list](#)

All Items

✓	Report ID	Description	Date	Category	Amount	Status
		description	2018-03-12	Meals	12	Submitted
		test	2018-03-06	Lodging	12	Submitted
		test	2018-03-12	Medical	222	Submitted

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