

LAB 4 – GENERATE PDF AND SAVE ATTACHMENTS TO SHAREPOINT USING QRULES

OVERVIEW

This lab shows how RenderForm and SaveToSharePoint commands come in handy when you need to render your form in a different file format and save them to SharePoint.

BEFORE YOU START

- This lab assumes that you have finished Lab 1, 2, and 3 Exercises.
- Download the latest Expense Report form template in FormsViewer and use it as a starter form for this Lab.
- Create a new document library – we'll call it Attachments. This is where we're going to save the PDF attachments later.

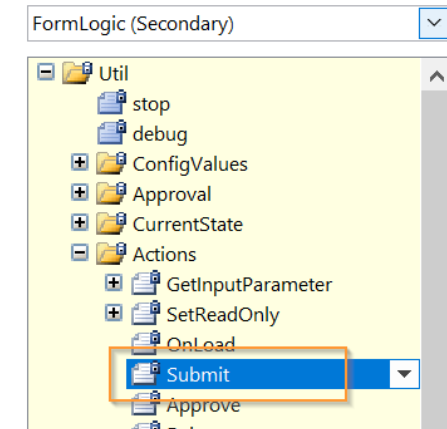
ADD THE RENDER FORM COMMAND

1. Open the Expense Report in InfoPath Designer.
2. Select **FormLogic (Secondary)** from the Fields task pane.
3. Locate the **Submit** node under the Actions folder.

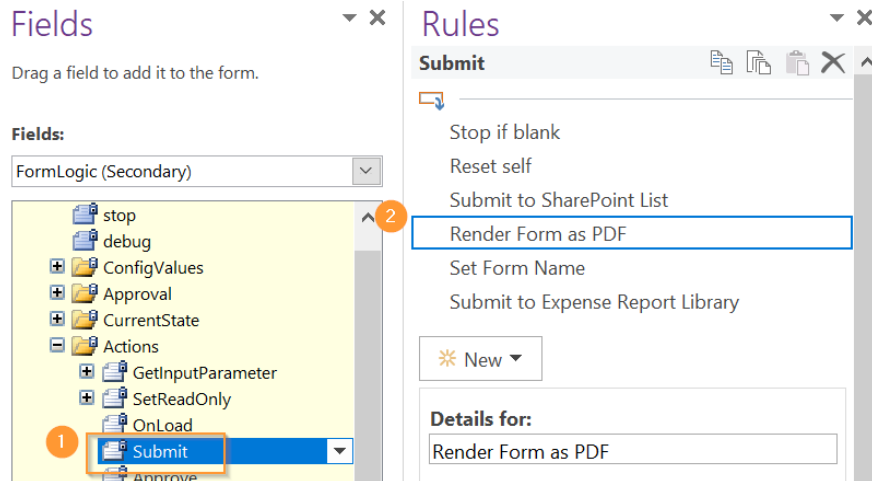
Fields

Drag a field to add it to the form.

Fields:



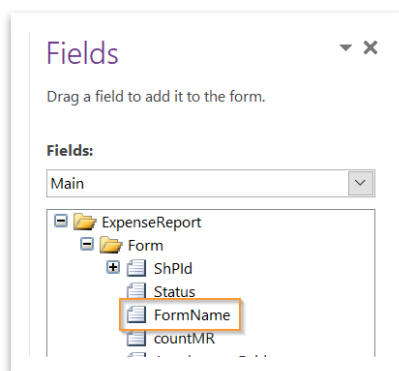
4. Open **Manage Rules** and add a new rule (you can place it just below the Submit to SharePoint List rule) – we'll call it **Render Form as PDF**.



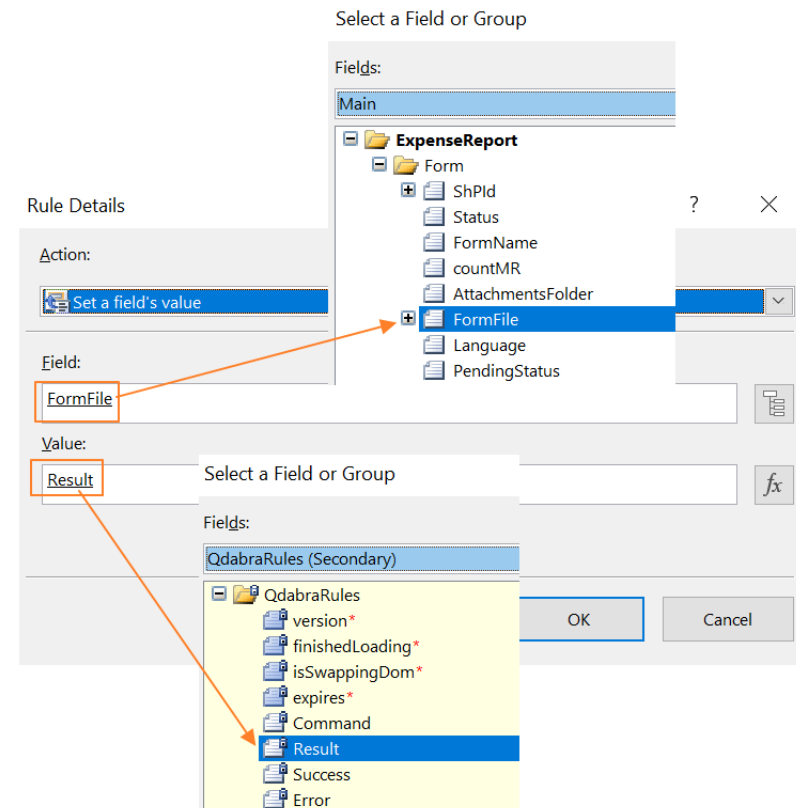
5. For this rule, add an action to **Set a field's value**.
6. Set the qRules **Command** node to this value (add as function)

concat("RenderForm /format=pdf /views=ExpenseReport /output=base64 /filename=", FormName, ".pdf")

where FormName is a field in the Main data source –



7. In the same rule, add another action to **Set a field's value**.
8. Set the **FormFile** field's value to the **Result** node of QdabraRules data source.



9. Here's our rule so far:

Details for:
Render Form as PDF

Condition:
None - Rule runs when button is clicked

Rule type:
Action

Run these actions: Add ▼

Set a field's value: Command = concat("RenderForm /format=pdf /views=...")

Set a field's value: FormFile = Result

☐ Don't run remaining rules if the condition of this rule is met

After the form is rendered as PDF, we want to save it to a location in our SharePoint site. Assuming that you already have a document library to save the attachments to, we can now move to the next command – SaveToSharePoint.

ADD THE SAVEDTOSHAREPOINT COMMAND

1. Next, add another rule just below Render Form as PDF – we'll call it **Save Attachment to a Document Library**.
2. Add an action to Set a field's value.

3. Set the qRules **Command** node to this value (plain text, not function)

SaveToSharePoint /url=[URL](#) /xpath=
/my:ExpenseReport/my:Form/my:FormFile

where URL is the URL of the document library in SharePoint we're saving the attachments to. **Do not include a slash at the end of the URL.**

4. Here's how the rules look like:

Rules

Submit

- Stop if blank
- Reset self
- Submit to SharePoint Lists
- Render Form as PDF
- Save Attachment to a Document Library**
- Set Form Name
- Submit to Expense Report Form Library

New ▼

Details for:
Save Attachment to a Document Library

Condition:
None - Rule runs when field changes

Rule type:
Action

Run these actions: Add ▼

Set a field's value: Command = "SaveToSharePoint /url=https://delvalequip.sharepoint.com/dev/Attachments /xpath= /my:ExpenseReport/my:Form/my:FormFile"

☐ Don't run remaining rules if the condition of this rule is met

5. Save the changes to the XSN.
6. Upload the form template in FormsViewer.

TEST YOUR FORM!

1. Go to the **Expense Report** library and click **+New**.
2. Submit a new form.
3. Check the document library. You should find a PDF attachment file saved in the library.
4. Here's the PDF format of the Expense Report:


Expense Report

FORM STATUS
SUBMITTED

NAME
 Jo-Anne Alfafara

MANAGER
 Jo-Anne Alfafara

ACCOUNTS MANAGER
 Jo-Anne Alfafara

REPORT DATE
 3/22/2018

BUSINESS PURPOSE
 Test

EXPENSE ITEMS				FROM: 3/15/2018 TO: 3/15/2018	
CATEGORY	EXPENSE DATE	DESCRIPTION	MERCHANT	RECEIPT	AMOUNT
Transportation	3/15/2018	test	test		\$12.00
SUBTOTAL					\$12.00
LESS CASH ADVANCE					\$0.00
TOTAL					\$12.00

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