

LAB 5 - SUBMIT & NEW WITH qRULES TRANSFORM COMMAND

OVERVIEW

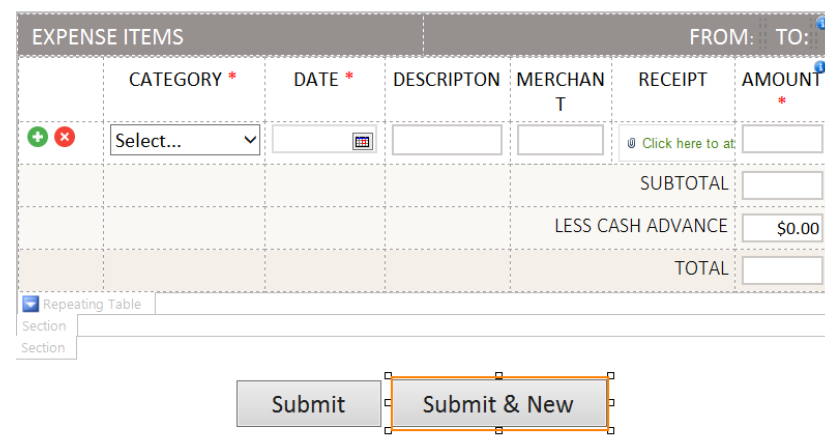
This document details how to use qRules' **Transform** command in the Expense Report form. We will use it mainly in the **Submit & New button**. This command makes it easier for the user when submitting multiple reports, cutting the need to go back to the SharePoint library to create a new form.

BEFORE YOU START

- This lab assumes that you have finished the Lab 1 through 4 Exercises. [Download](#) the latest Expense Report form template in FormsViewer and use it as a starter form for this Lab.

ADD SUBMIT & NEW BUTTON

1. Open the Expense Report in InfoPath Designer.
2. Copy the **Submit** button and paste the new one beside it. Let's rename it **Submit & New**.



This button will execute the same actions as what the **Submit** button does, except that once it's clicked, it will result to a fresh new form, ready to be filled out again.

3. Select the **Submit & New** button. This will show us the same rules used in the **Submit** button.

Clear error message
 Count 75 with missing receipt
 Count Future Dates in Expense Dates
 Count 4 weeks past current date in Expense Dates
 Check if missing receipt found
 Check if Future Dates found
 Check if 4 weeks past current date found
 Check for missing values
 Error: Missing Receipt
 Error: Future Dates
 Error: 4 Weeks Past Current Date
 Error: Mandatory fields
 Set Report Name
 Set Form Status
 Generate Guid
 Set Assignment
 Print no receipt
 Submit

New ▾

4. In the **Submit** rule, add a new **Set a field's value** action:
 Use the QdabraRules **Command** and input the following as value:

Transform /xsltfile=upgrade1.xsl /sourcefile=template.xml /destpath=/* /excluderoot=true

Rule Details

Action:

Set a field's value

Field:

Command

Value:

Transform /xsltfile=upgrade1.xsl /sourcefile=template.xml /destpath=/* /excluderoot=true

OK Cancel

Details for:

Submit

Condition:

None - Rule runs when button is clicked

Rule type:

Action

Run these actions: *

Add ▾

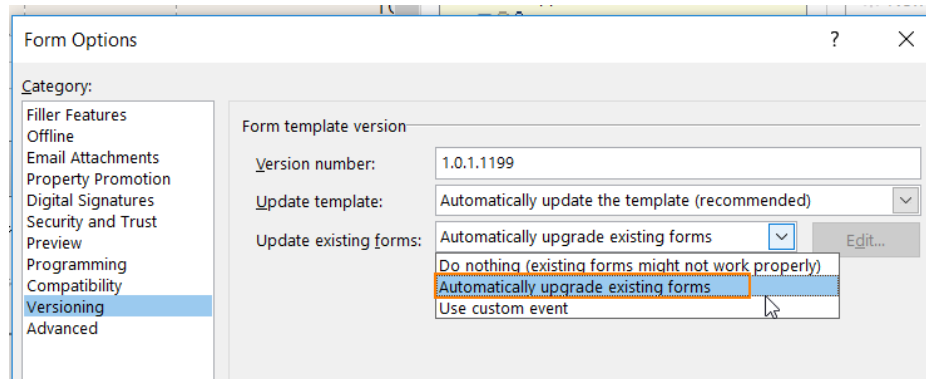
Set a field's value: Submit = "go"

Show dialog box message: Form is successfully submitted.

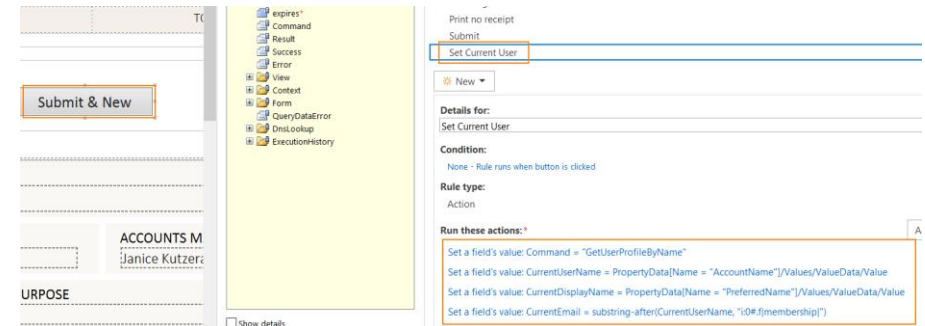
Set a field's value: Command = "Transform /xsltfile=upgrade1.xsl /sourcefile=template.xml /destp..."

Important: Make sure that you have the upgrade1.xsl file in your form. To verify this, export all the resource files in a local folder. This can be done by going to InfoPath form **File > Publish > Export Source Files**. Then check if the upgrade1.xsl is one of the files exported.

If not, then you will need to generate the xsl file by going to InfoPath form template then **File > Info > Form Options > Versioning**. Then select **Automatically upgrade existing forms**.

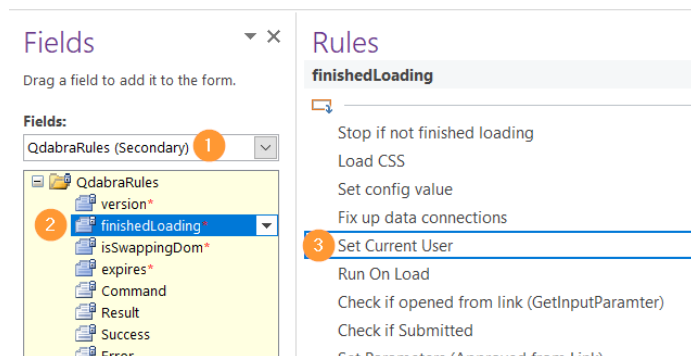


Paste it in the **Submit & New** Rules pane after the **Submit** rule. It will look something like this.

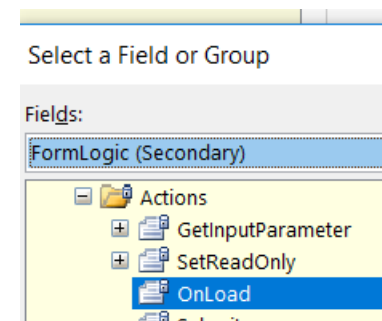


5. Let's add two more rules.

For the first rule, just copy the same rule we have under **QdabraRules** data source > **finishedLoading**. Copy **Set Current User** rule.

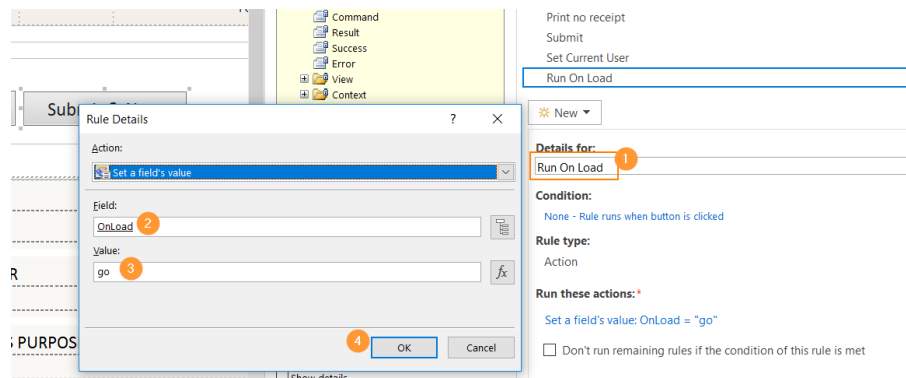


6. Add another rule named **Run On Load**. Select **Set field's value** and specify the following: **Field:** OnLoad (pointing to **FormLogic > Actions > OnLoad**)



Value: go

Result will be as follows:

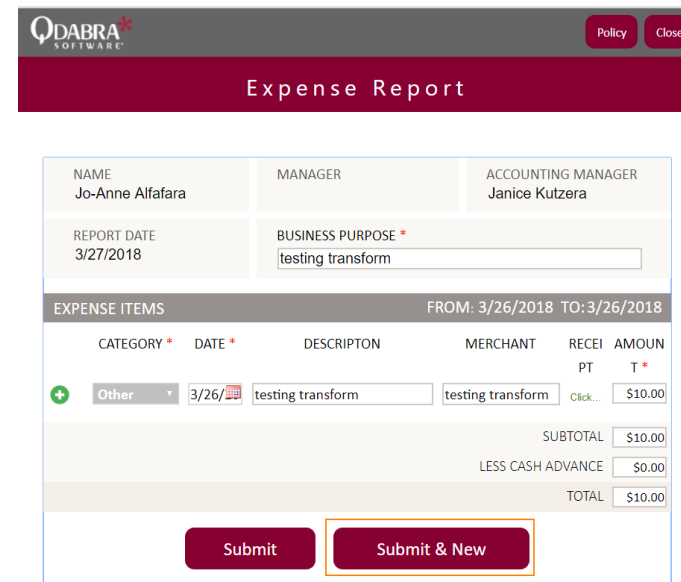


7. Save the XSN file and upload it again in FormsViewer.

TEST YOUR FORM!

Go to the Expense Report library and click **+New**.

Fill out the form and click **Submit & New**.



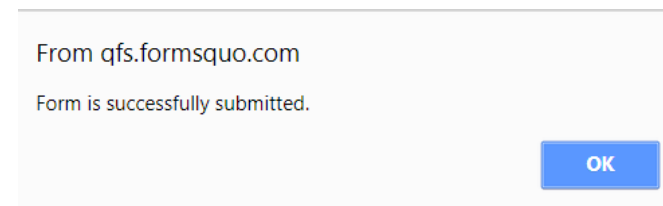
NAME	MANAGER	ACCOUNTING MANAGER
Jo-Anne Alfafara		Janice Kutzera

REPORT DATE	BUSINESS PURPOSE *
3/27/2018	testing transform

EXPENSE ITEMS						FROM: 3/26/2018	TO: 3/26/2018
CATEGORY *	DATE *	DESCRIPTION	MERCHANT	RECEIPT	AMOUNT		
				PT	T *		
Other	3/26/2018	testing transform	testing transform	Click...	\$10.00		
					SUBTOTAL	\$10.00	
					LESS CASH ADVANCE	\$0.00	
					TOTAL	\$10.00	

Submit Submit & New

Dialog box will appear, saying it's successful.



From qfs.formsquo.com

Form is successfully submitted.

OK

The report should be submitted in the library and lists. And the screen will retain its location, giving you a fresh new form to fill out.



PolicyClose

Expense Report

NAME
Jo-Anne Alfafara

MANAGER

ACCOUNTING MANAGER
Janice Kutzera

REPORT DATE
3/27/2018

BUSINESS PURPOSE *

EXPENSE ITEMS

FROM: TO:

CATEGORY *	DATE *	DESCRIPTION	MERCHANT	RECEI PT	AMOUN T *
 Select...				Click...	

SUBTOTAL

\$0.00

LESS CASH ADVANCE

\$0.00

TOTAL

\$0.00

Submit

Submit & New

CONTACT INFORMATION

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