

Map Your Form Data to a SharePoint List

10/09/2019

Purpose

This document will show you how you can submit data to a SharePoint list using the SubmitToSharePointList qRules command. It will also help you get familiar with FormsViewer SharePoint List Mappings feature which allows the creation of SharePoint list mappings.

Pre-requisites

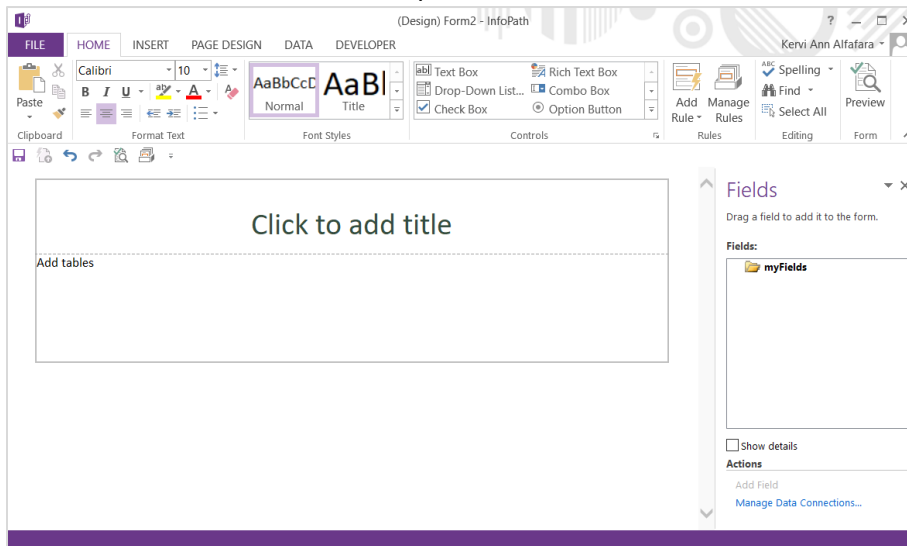
Microsoft InfoPath 2013

Qdabra FormsViewer v3.2+

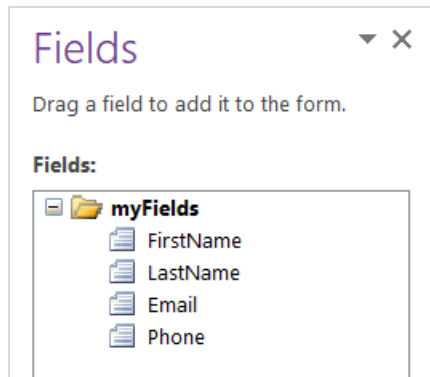
Steps

Create an InfoPath Form Template

1. Create a new InfoPath form template.



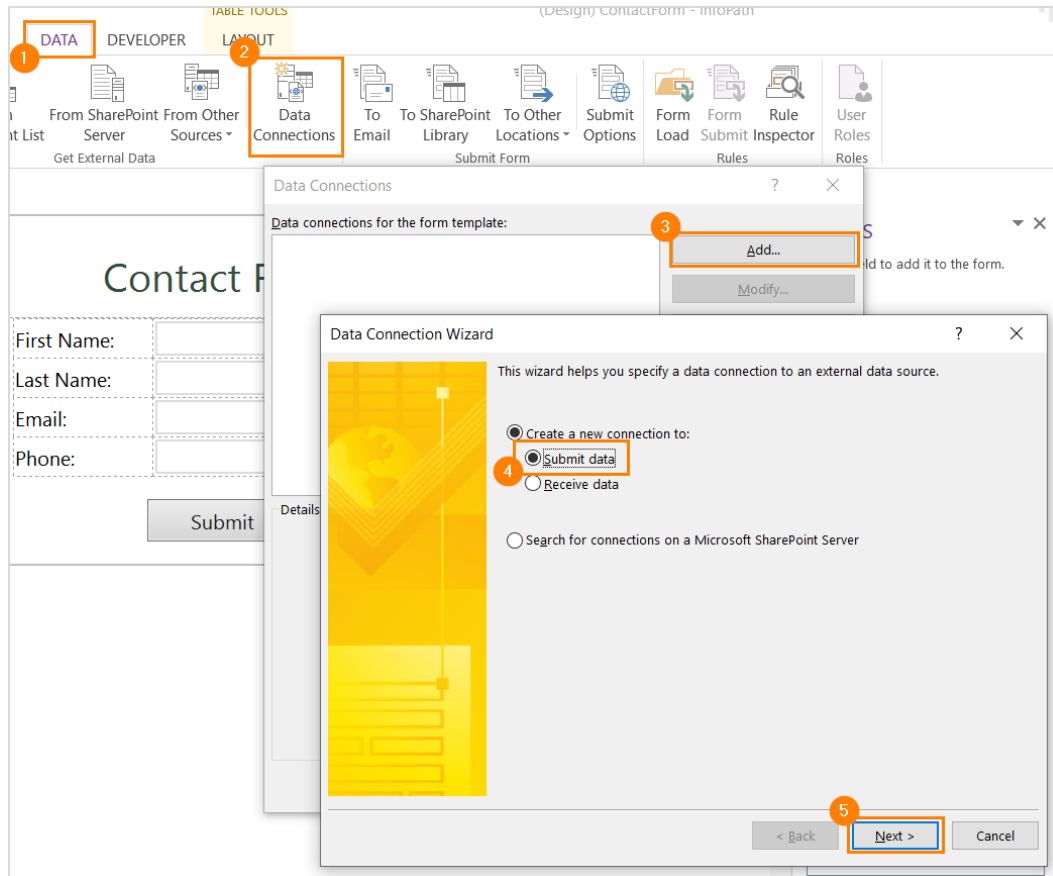
2. Add new fields to the schema.



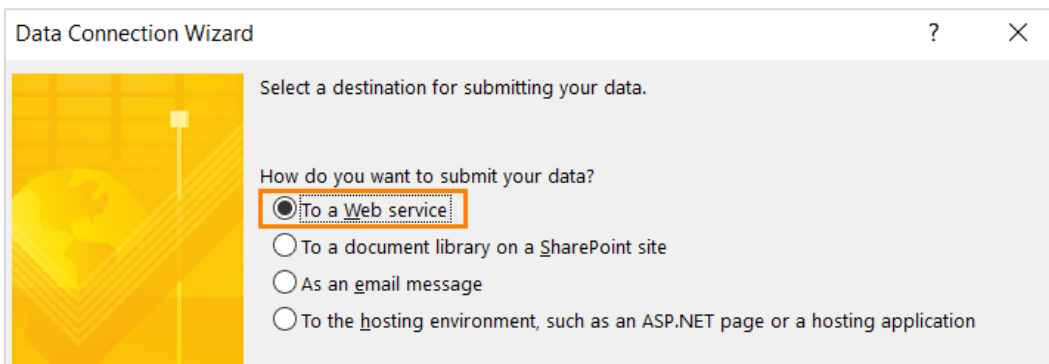
3. Drag and drop the fields to the canvas to create text field controls. Add some layout to the text and table.

4. Add a button which will be used to submit data to the SharePoint list.

5. Add a **Submit** data connection to the **UpdateListItems** method of the SharePoint Lists web service/
On the **DATA** tab in the ribbon, select **Data Connections**. In the wizard, click **Add** and select the option **Submit Data**.

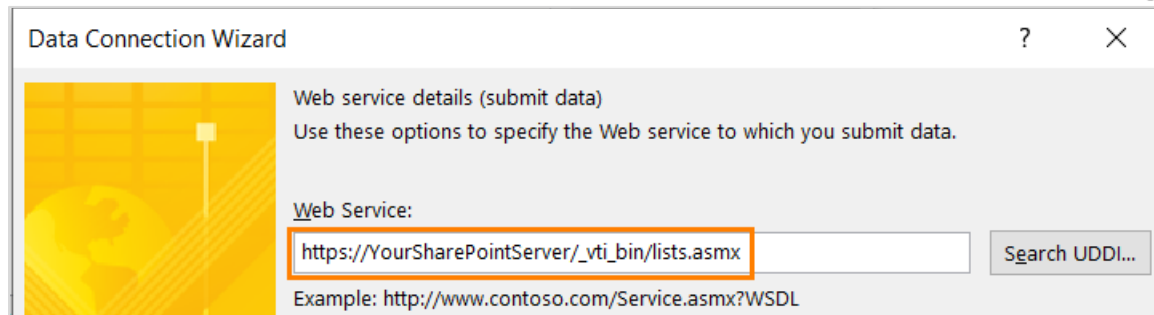


In the next window, select **To a Web service**.

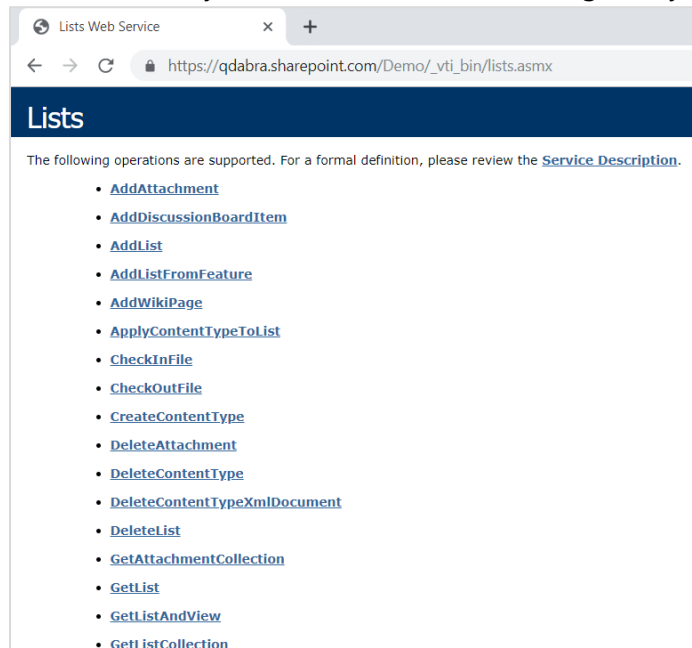


The URL for the Lists web service is: http://YourSharePointServer/_vti_bin/lists.asmx.

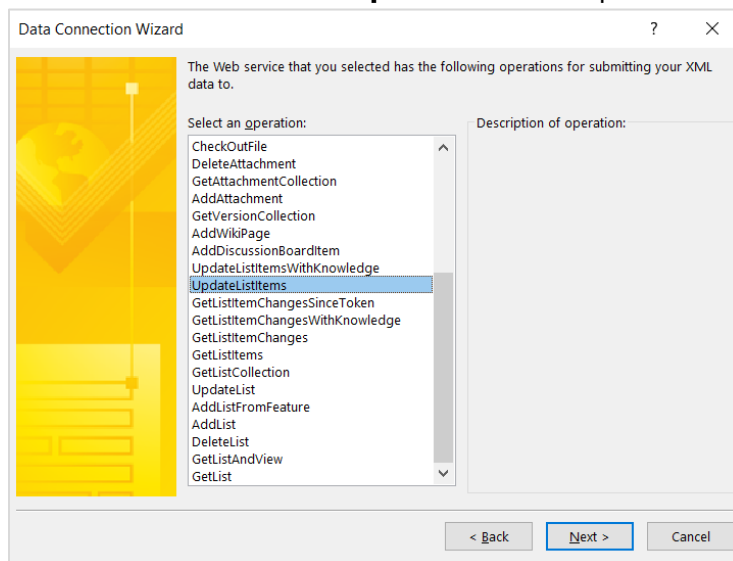
Replace "YourSharePointServer" with your actual server name.



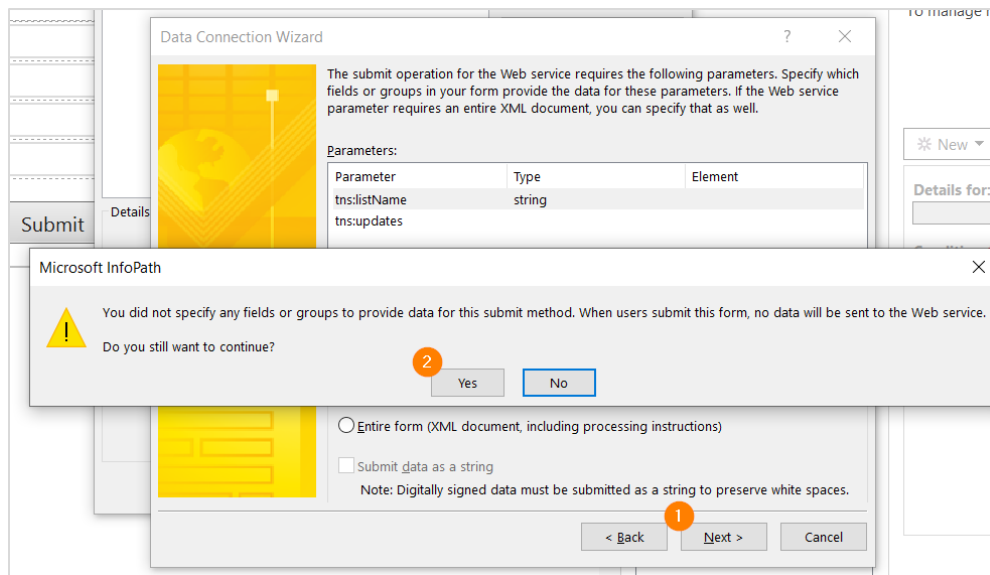
If in doubt, test your URL in a browser, making sure you get a page that looks like this:



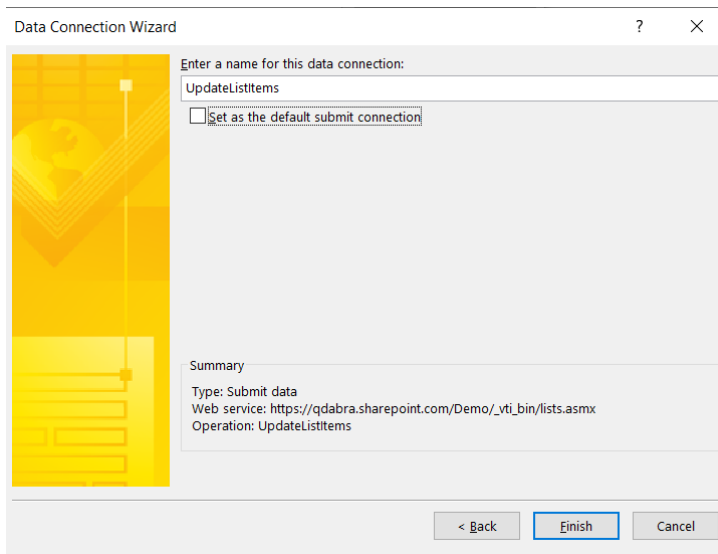
In the next window, select **UpdateListItems** operation.



In the next window, select **Next** then **Yes** to continue.



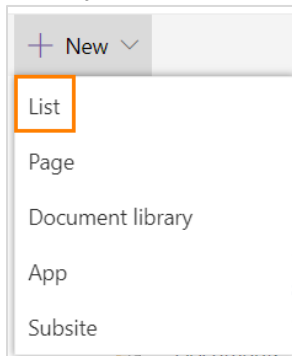
Rename the data connection and uncheck **Set as the default submit connection**. Click **Finish**.



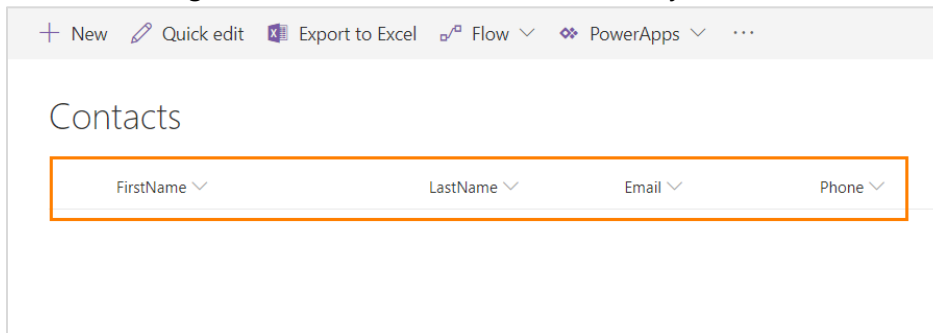
6. Save your changes.

Create a SharePoint List

1. Go to your SharePoint site and create a new list.

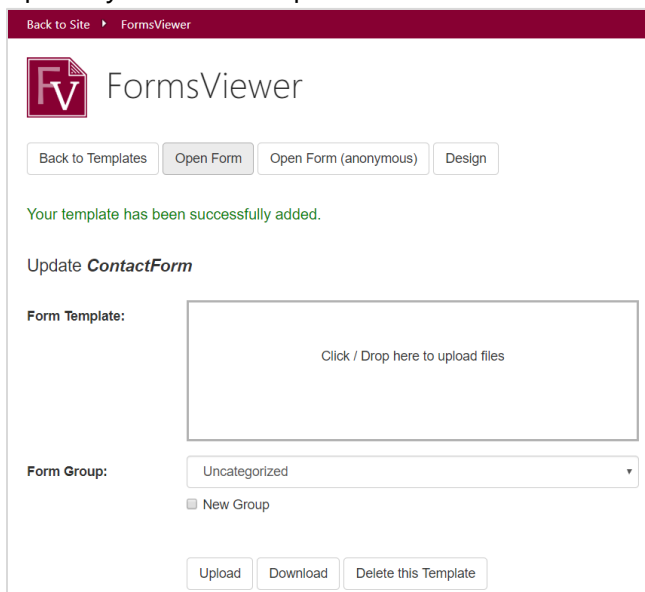


2. Add new columns to your list based on the fields that you created in the form template. Note that you don't need to give the columns the exact names as your form fields.

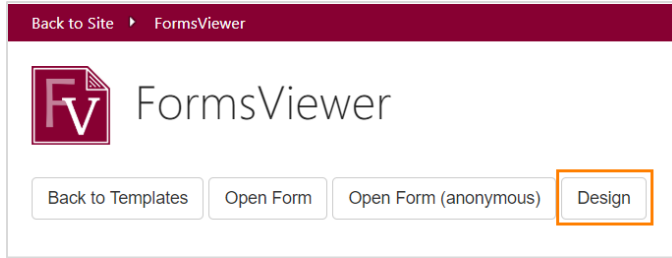


Create a SharePoint Mapping

1. Upload your form template to FormsViewer.



2. Go to FormsViewer template page and click **Design**.

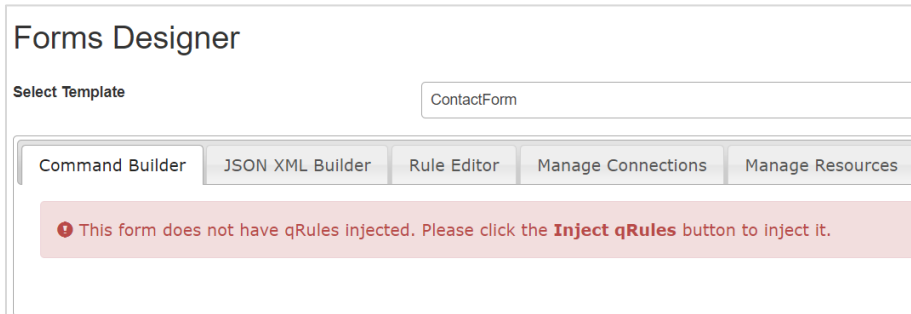


Back to Site ▸ FormsViewer

Fv FormsViewer

Back to Templates Open Form Open Form (anonymous) **Design**

3. To create a SharePoint list mapping, you need to inject qRules in your form. To do this,
 - a. Go to **Command Builder** tab.



Forms Designer

Select Template ContactForm

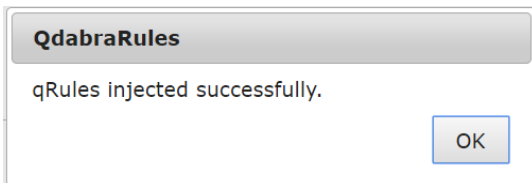
Command Builder JSON XML Builder Rule Editor Manage Connections Manage Resources

⚠ This form does not have qRules injected. Please click the **Inject qRules** button to inject it.

- b. Click **Inject qRules**.



Inject qRules

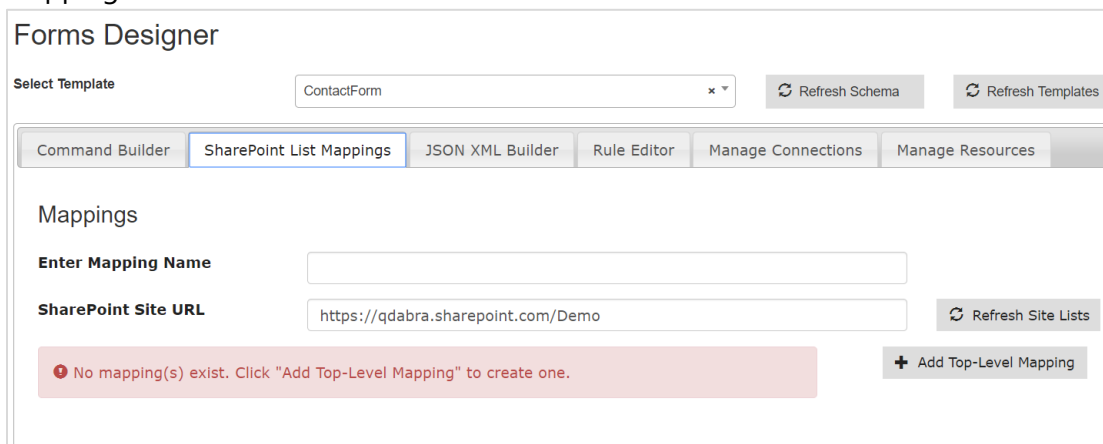


QdabraRules

qRules injected successfully.

OK

4. Click the **SharePoint List Mappings** tab. This will show you the section where you will create the mapping.



Forms Designer

Select Template ContactForm x ▾ Refresh Schema Refresh Templates

Command Builder **SharePoint List Mappings** JSON XML Builder Rule Editor Manage Connections Manage Resources

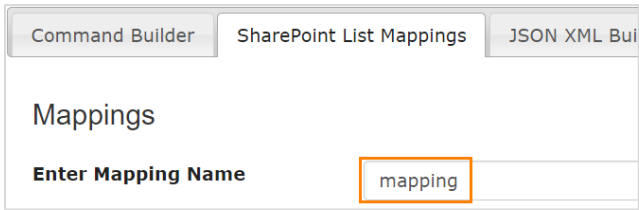
Mappings

Enter Mapping Name

SharePoint Site URL https://qdabra.sharepoint.com/Demo Refresh Site Lists

⚠ No mapping(s) exist. Click "Add Top-Level Mapping" to create one. + Add Top-Level Mapping

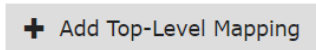
5. Enter a new mapping name.



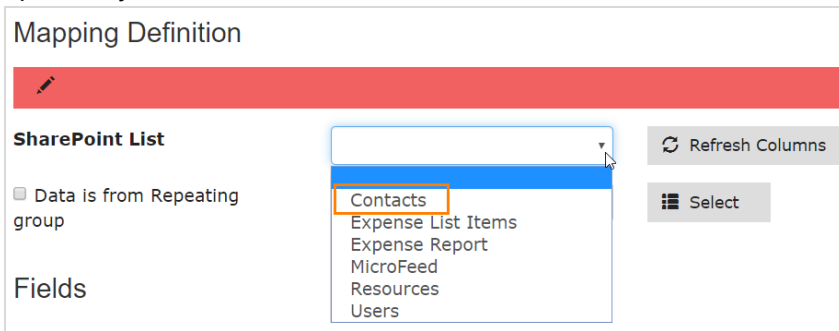
6. Ensure that the value in the **SharePoint Site URL** is the correct site where you created the SharePoint list.



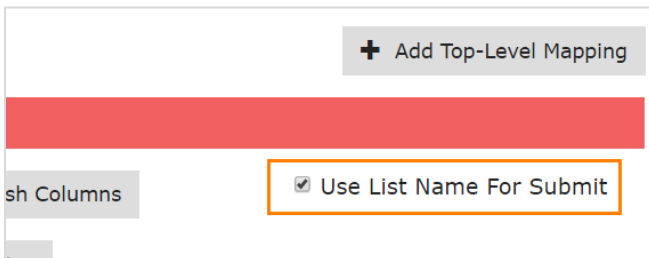
7. Click **+ Add Top-Level Mapping**.



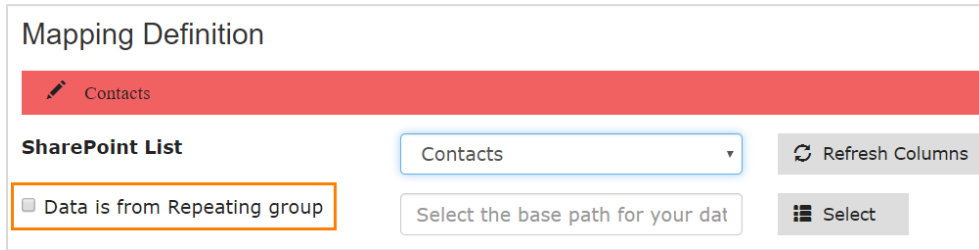
8. Select your SharePoint list from the dropdown. Note: You can click **Refresh Columns** in case you updated your SharePoint list and added a new column.



9. Check the **Use List Name For Submit** option. When this option is checked, the mapping will allow submit based on the SharePoint list name. Otherwise, it will submit the data based on the SharePoint list GUID.

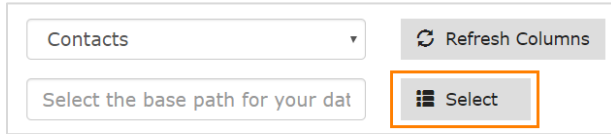


10. Leave the **Data is from Repeating group** unchecked since the form fields in this case are not part of a repeating group.



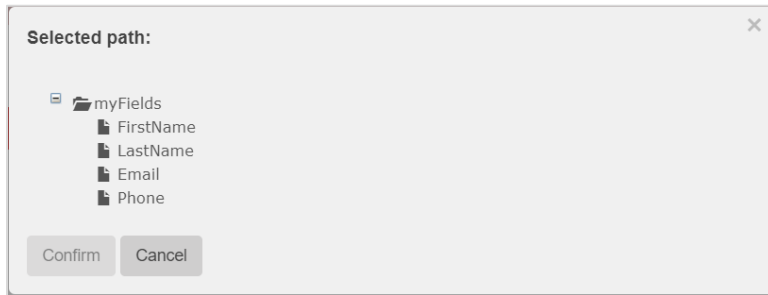
The dialog box is titled "Mapping Definition". It has a red header bar with a pencil icon and the text "Contacts". Below the header, there is a section labeled "SharePoint List" with a dropdown menu showing "Contacts" and a "Refresh Columns" button. Below this, there is a checkbox labeled "Data is from Repeating group" which is unchecked. To the right of the checkbox is a text input field with the placeholder "Select the base path for your dat". At the bottom right, there is a "Select" button with a list icon.

11. To select the base path for the mapping, click **Select**.



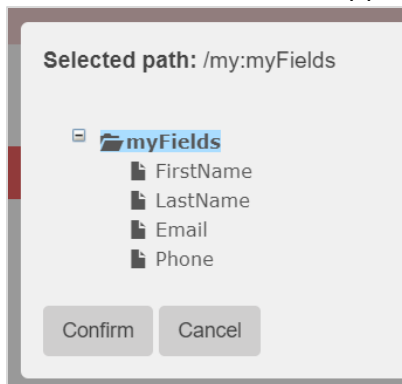
This is a cropped view of the "Mapping Definition" dialog box. It shows the "Contacts" dropdown, the "Refresh Columns" button, the "Select the base path for your dat" text input, and the "Select" button, which is highlighted with an orange border.

This will show us a new window with the field nodes from the form template.



The dialog box is titled "Selected path:". It shows a tree view with a folder icon and the text "myFields". Under "myFields", there are four file icons with the labels "FirstName", "LastName", "Email", and "Phone". At the bottom, there are "Confirm" and "Cancel" buttons.

12. Select the node for the mapping. In this case, select the root node. Click **Confirm**.



This is a cropped view of the "Selected path:" dialog box. The "myFields" folder is now highlighted with a blue selection bar. The "Selected path:" text at the top now reads "/my:myFields". The "Confirm" and "Cancel" buttons are still at the bottom.

13. Under the **Fields** section, click **Select** and select the first field from the form template that you want to map to one of the list columns.

Fields

Form Field

Select

Once the form field is selected, the **Form Field** will be populated with the XPath of the field that you just selected.

Selected path: /my:myFields/my:FirstName

myFields

FirstName

LastName

Email

Phone

Confirm

Cancel

Fields

Form Field

Select

- In the **SharePoint Column** dropdown, select the column from the SharePoint list that you want to map against the first form field.

SharePoint Column

FirstName

LastName

Email

Phone

ID

Attachments

SharePoint Column

15. Choose the correct field type in the **Options** dropdown. If your field is a text field, select **Plain**.

Options

- Plain
- Plain
- ID
- Rich Text
- Attachment
- Date
- Person
- Parent List Id

16. Click **+ Add Field** to add another set of mapped fields.

☒ Use List Name For Submit

+ Add Field

Options

Plain Remove

17. Click **Save** once you're done mapping all the form fields to the list columns.

Form Field	SharePoint Column	Options
my:FirstName	FirstName	Plain
my:LastName	LastName	Plain
my:Email	Email	Plain
my:Phone	Phone	Plain

Save

18. This will show a prompt message saying that the injection is successful.

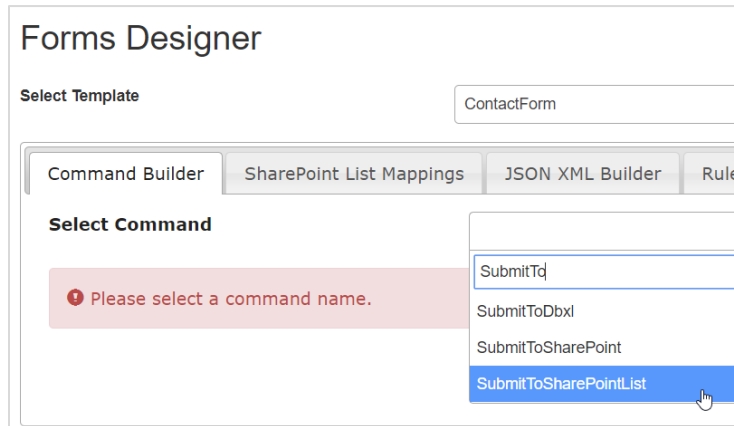
Mapping

Mapping injected successfully

OK

Add SubmitToSharePointList qRules Command

1. In the **Command Builder** tab, search for **SubmitToSharePointList** command in the **Select Command** field.



Forms Designer

Select Template: ContactForm

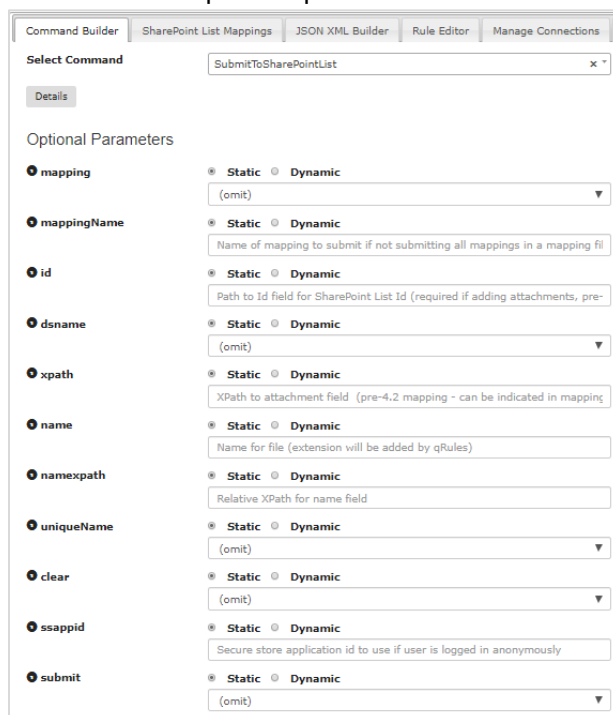
Command Builder | SharePoint List Mappings | JSON XML Builder | Rule

Select Command

Please select a command name.

- SubmitTo
- SubmitToDbxl
- SubmitToSharePoint
- SubmitToSharePointList**

These are the optional parameters for the **SubmitToSharePointList** command.



Command Builder | SharePoint List Mappings | JSON XML Builder | Rule Editor | Manage Connections

Select Command: SubmitToSharePointList

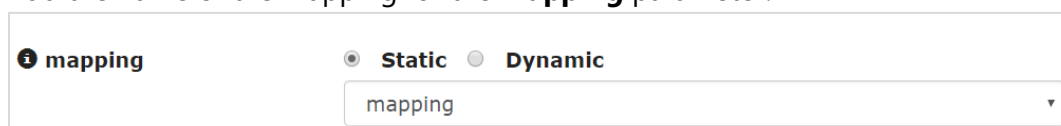
Details

Optional Parameters

- mapping**
 - Static (selected) | Dynamic
 - (omit)
- mappingName**
 - Static | Dynamic
 - Name of mapping to submit if not submitting all mappings in a mapping fill
- id**
 - Static | Dynamic
 - Path to Id field for SharePoint List Id (required if adding attachments, pre-
- dsname**
 - Static | Dynamic
 - (omit)
- xpath**
 - Static | Dynamic
 - XPath to attachment field (pre-4.2 mapping - can be indicated in mapping
- name**
 - Static | Dynamic
 - Name for file (extension will be added by qRules)
- namexpath**
 - Static | Dynamic
 - Relative XPath for name field
- uniqueName**
 - Static | Dynamic
 - (omit)
- clear**
 - Static | Dynamic
 - (omit)
- ssappid**
 - Static | Dynamic
 - Secure store application id to use if user is logged in anonymously
- submit**
 - Static | Dynamic
 - (omit)

2. There are two parameters that we will populate for the mapping - **mapping** and **submit**.

Add the name of the mapping for the **mapping** parameter.

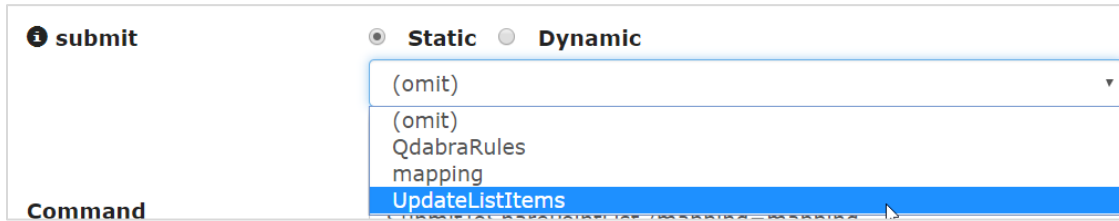


mapping

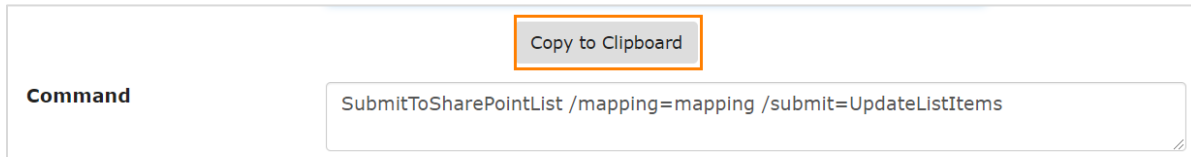
Static (selected) | Dynamic

mapping

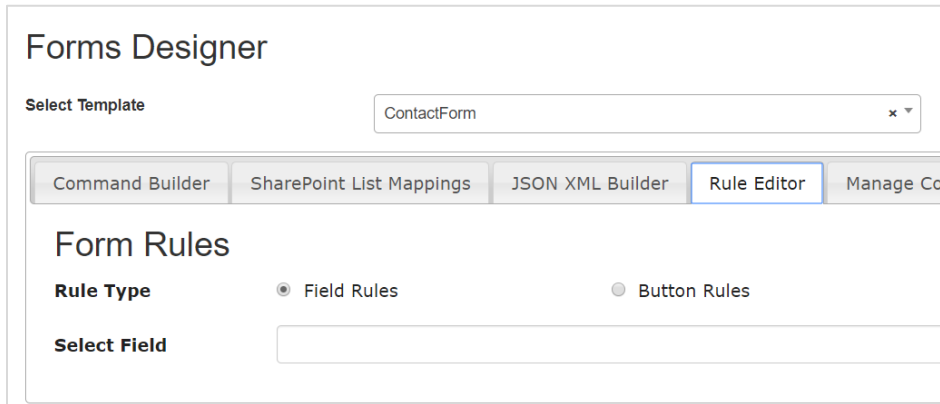
All the data connections in your form will be available in the **submit** parameter dropdown. Select **UpdateListItems** data connection.



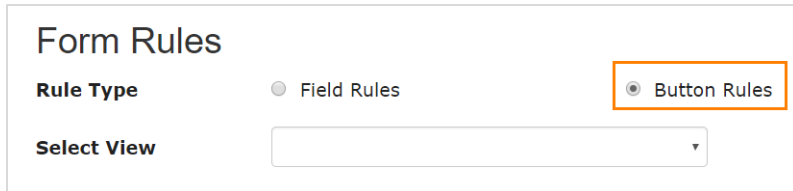
- Click **Copy to Clipboard** to copy the generated command.



- Go to the **Rule Editor** tab.



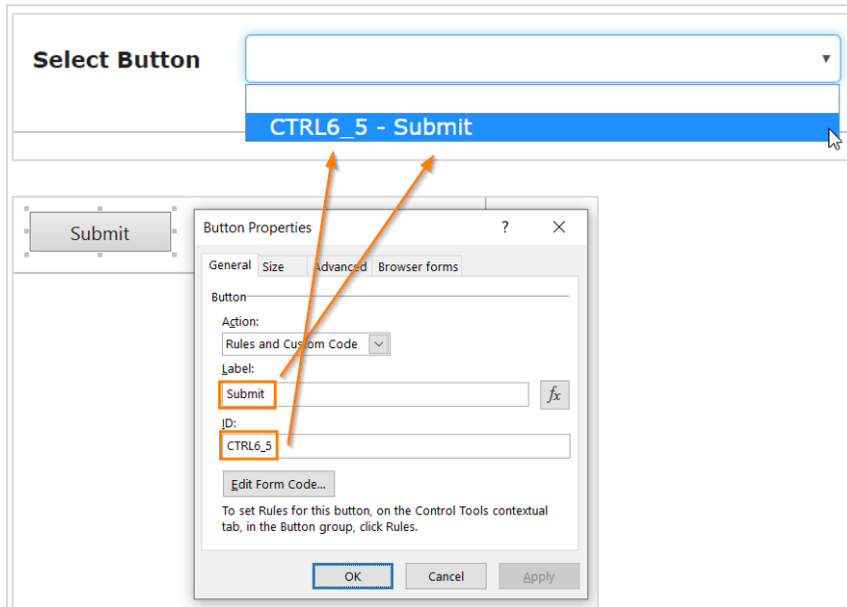
- Select the **Button Rules** option since the command will be added to the **Submit** button in the form.



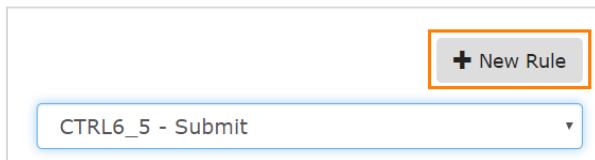
- Select the form view where the button is located.



7. Select the **Submit** button. You'll see in the dropdown that the button ID is concatenated with the button label.



8. Click **+ New Rule**.



9. Add a name for the new rule.

Rule Definition

Rule Name ☒ Enabled ☐ Stop at this rule

Condition

10. Add an action to **Set a field's value**.

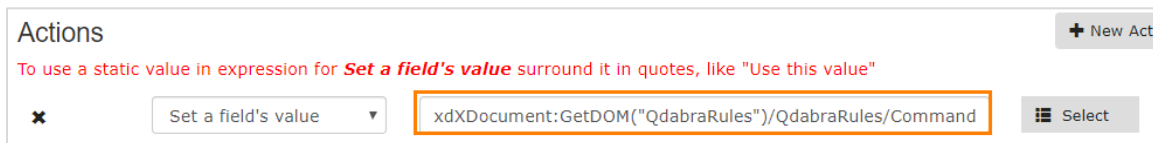
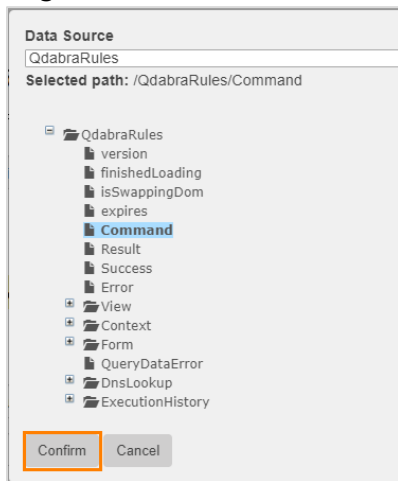
Actions

⚠ Please specify valid values for all actions

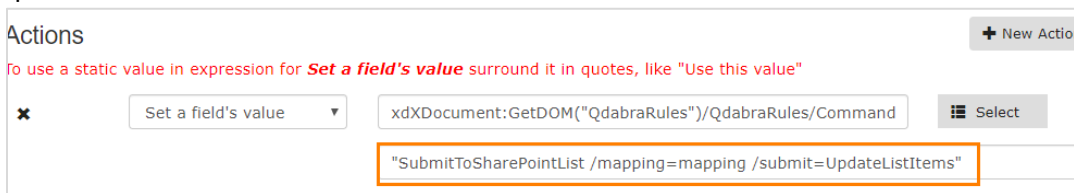
To use a static value in expression for **Set a field's value** surround it

✖

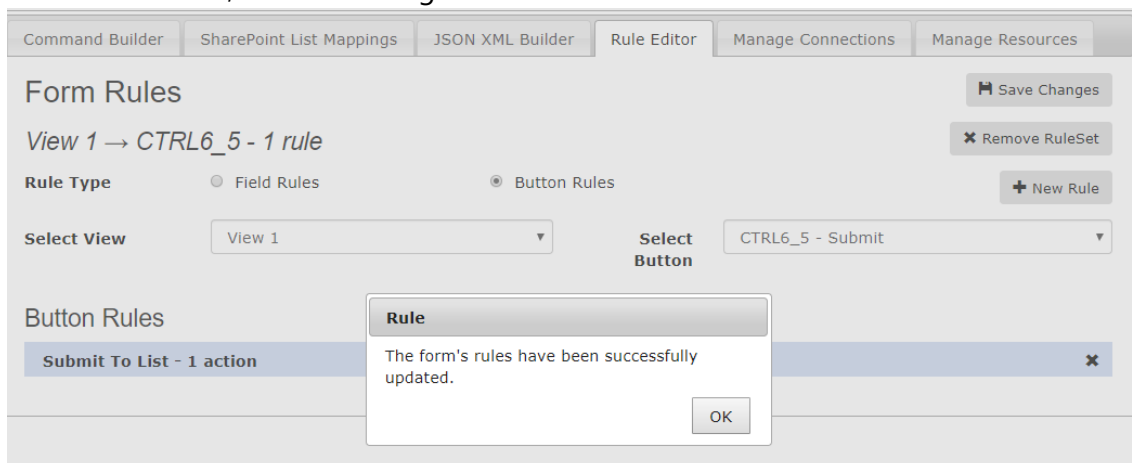
11. Click the **Select** button and select the **Command** field under **QdabraRules** data connection as the target field. Click **Confirm**.



12. Paste the command that was just created using the **Command Builder**. Don't forget to surround it in quotes.

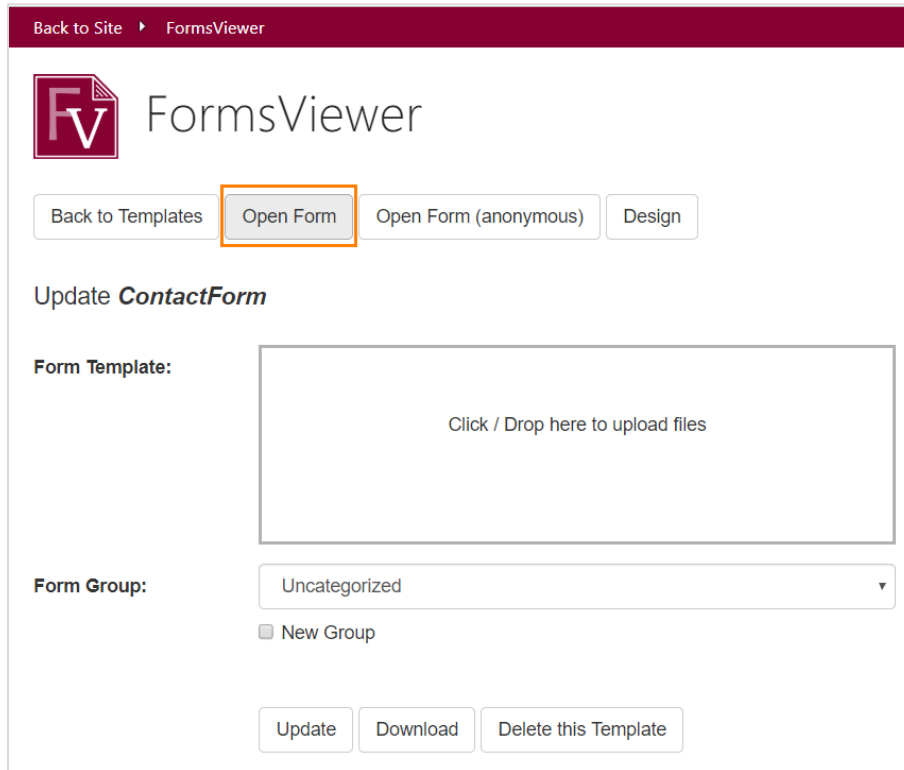


13. Once that's done, save the changes.



Test Your Form!

Open your form by clicking **Open Form** in FormsViewer template page.



Back to Site ▶ FormsViewer

FV FormsViewer

Back to Templates **Open Form** Open Form (anonymous) Design

Update *ContactForm*

Form Template:

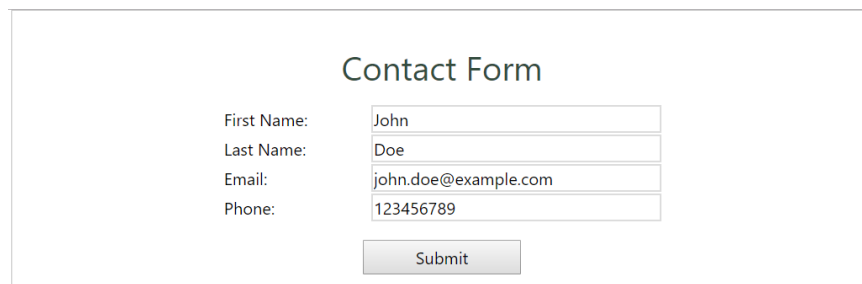
Click / Drop here to upload files

Form Group: Uncategorized ▼

☐ New Group

Update Download Delete this Template

Fill out the fields in the form and click **Submit**.



Contact Form

First Name: John

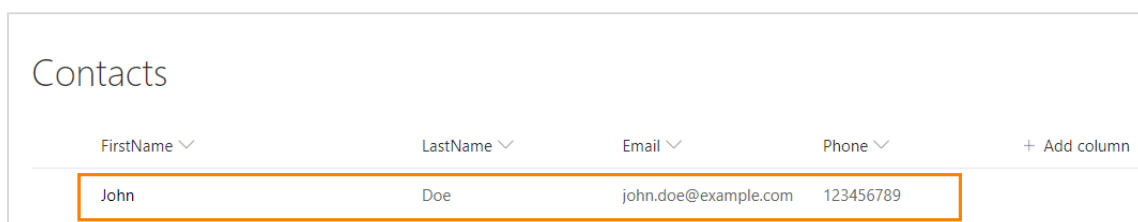
Last Name: Doe

Email: john.doe@example.com

Phone: 123456789

Submit

Verify that the data is submitted to the list.



FirstName ▼	LastName ▼	Email ▼	Phone ▼	+ Add column
John	Doe	john.doe@example.com	123456789	

Contact Information

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Email:	Support@Qdabra.com
Website:	http://www.qdabra.com
Community:	http://www.infopathdev.com