



Lab 2 – Upload File Attachments to a Document Library

Overview

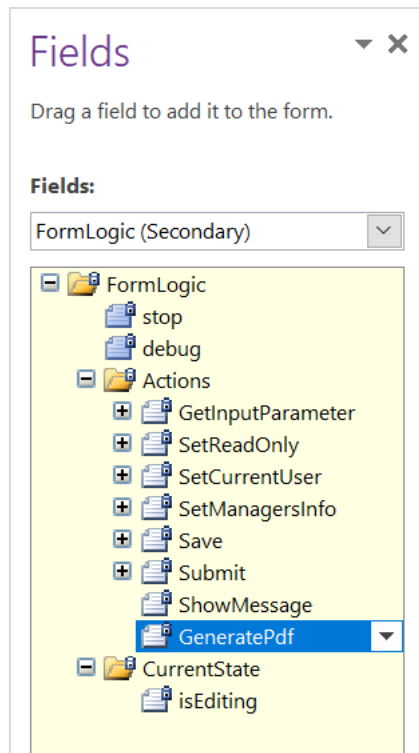
This lab shows how the **SaveToSharePoint** and **CreateSharePointFolder** commands comes in handy when you need to save file attachments from your form to a document library in SharePoint.

Before you start

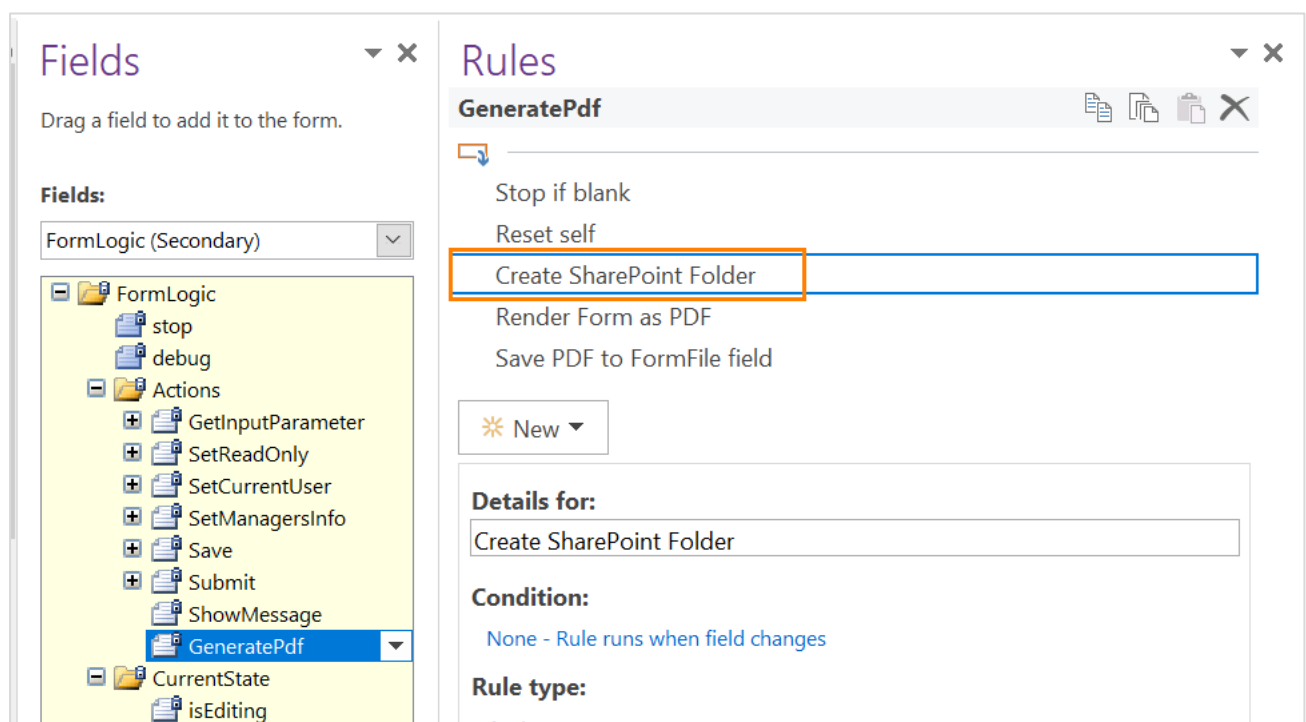
- This lab assumes that you have finished the previous labs in this training. Use the Start form provided in this lab.
- Create a new document library – we'll call it **Attachments**. This is where we're going to save the file attachments later.

Create Folder in a Document Library using qRules

1. Open the starter form for this lab in InfoPath Designer.
2. In the Fields pane, select the FormLogic secondary data source and navigate to GeneratePdf node (/FormLogic/Actions/GeneratePdf)

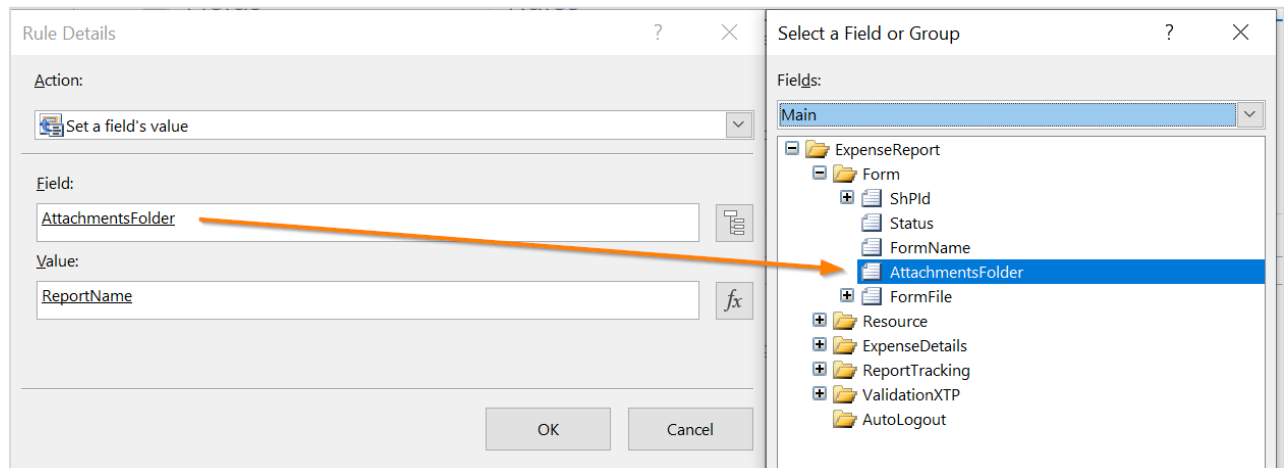


- Under the **Reset self** rule, create a new rule and let's call it **Create SharePoint Folder**. Since we have two attachments from our form, one is the PDF file and the other is/are the receipt(s), it's better to have a dedicated folder for each submitted form.

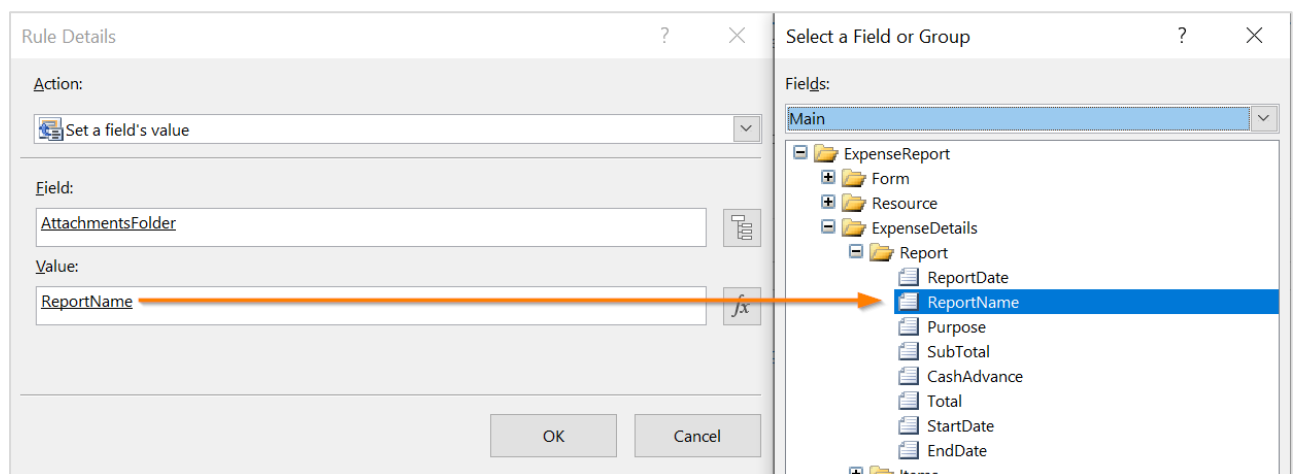


- Within the new rule, create two actions. First is to set the **AttachmentsFolder** field to the value of the **ReportName** field. Here we are setting the name of our folder to the Report Name of the form.

AttachmentsFolder XPath: /my:ExpenseReport/my:Form/my:AttachmentsFolder



ReportName XPath: /my:ExpenseReport/my:ExpenseDetails/my:Report/my:ReportName



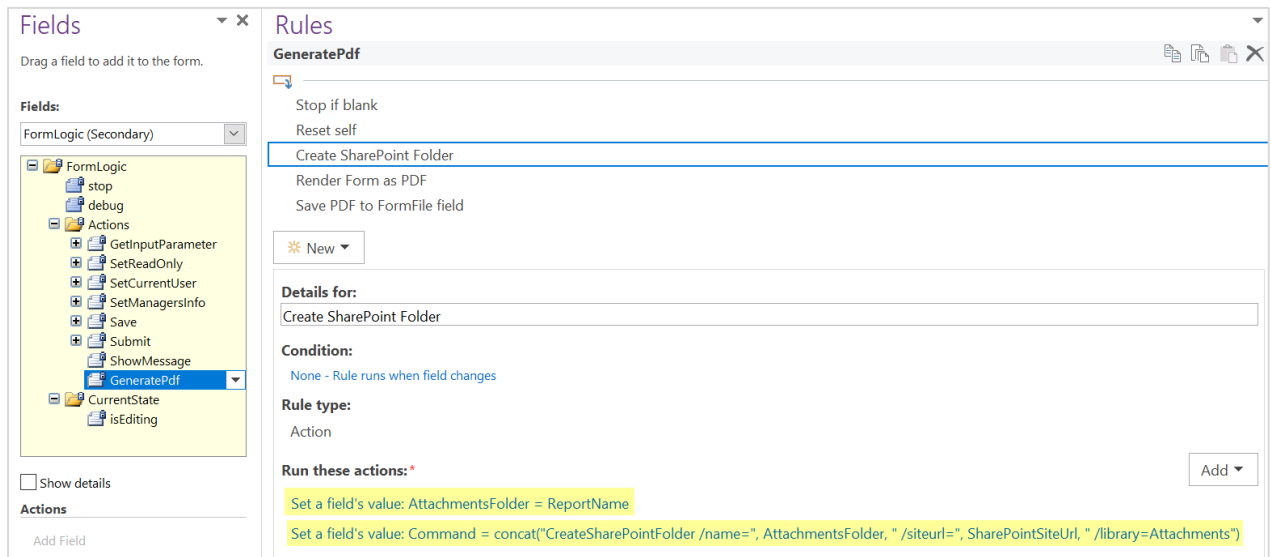
- For the second action, use the CreateSharePointFolder qRules command. Set the QdabraRules Command node with the following command:

```
concat("CreateSharePointFolder /name=", AttachmentsFolder, "
/siteurl=", SharePointSiteUrl, " /library=Attachments")
```

where AttachmentsFolder points to

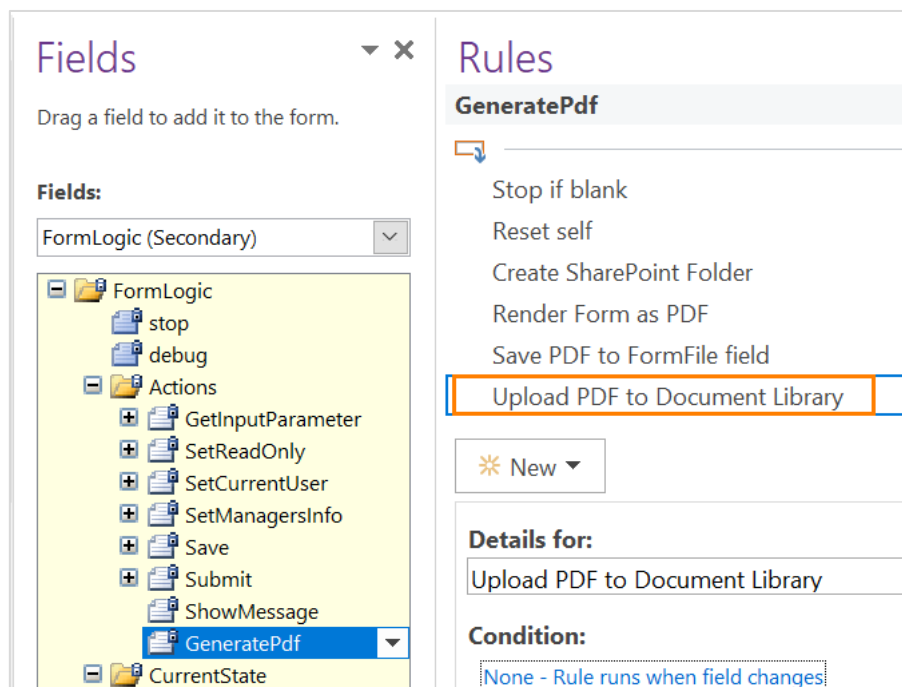
/my:ExpenseReport/my:Form/my:AttachmentsFolder and SharePointSiteUrl to
/XtpLogic/Environment/SharePointSiteUrl of XtpLogic_DynamicDCs data source

This is how the rule should look like:



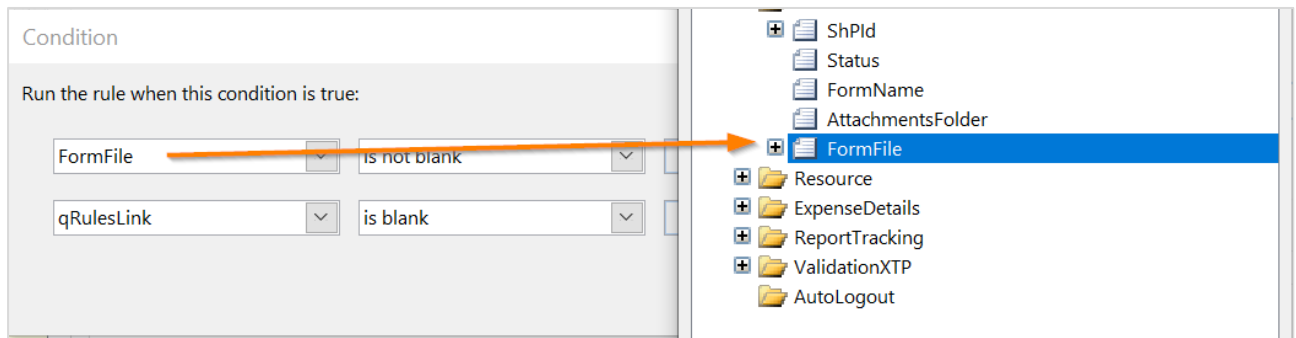
Use SaveToSharePoint to Upload Attachments

1. Create a new rule called **Upload PDF to Document Library**.

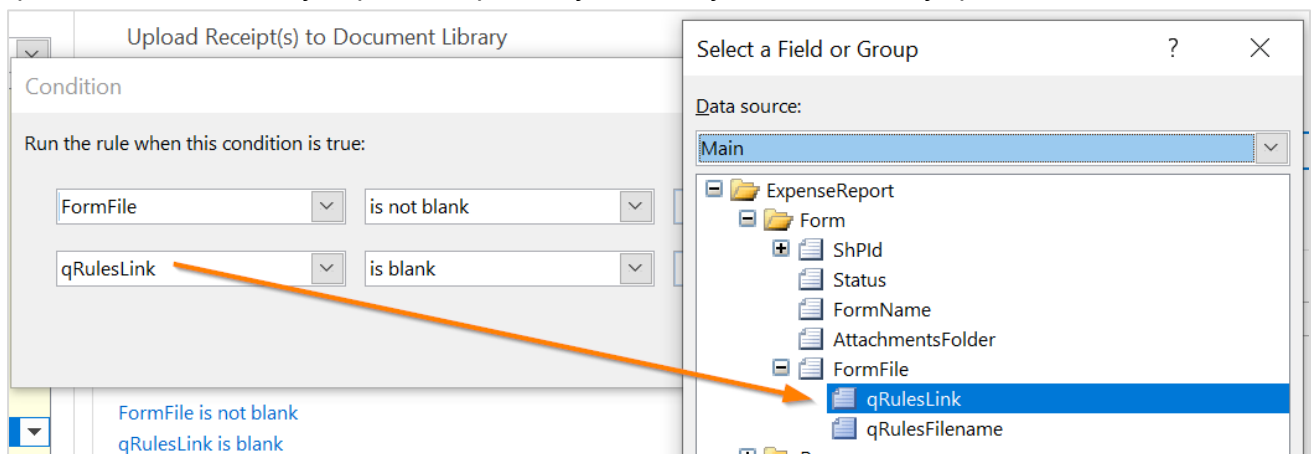


2. In the rule, add the following condition:
FormFile is not blank AND qRulesLink is blank

FormFile XPath: /my:ExpenseReport/my:Form/my:FormFile



qRulesLink XPath: /my:ExpenseReport/my:Form/my:FormFile/@my:qRulesLink



3. In the same rule, add an action to use the SaveToSharePoint command. Set the QdabraRules Command node with the command below:

```
concat("SaveToSharePoint /url=", SharePointSiteUrl, "Attachments/",  
AttachmentsFolder, " /xpath=/my:ExpenseReport/my:Form/my:FormFile")
```

where SharePointSiteUrl points to /XtpLogic/Environment/SharePointSiteUrl of XtpLogic_DynamicDCs data source and AttachmentsFolder points to /my:ExpenseReport/my:Form/my:AttachmentsFolder.

Fields

Drag a field to add it to the form.

Fields:

FormLogic (Secondary)

FormLogic

- stop
- debug
- Actions**
 - GetInputParameter
 - SetReadOnly
 - SetCurrentUser
 - SetManagersInfo
 - Save
 - Submit
 - ShowMessage
 - GeneratePdf**
- CurrentState
- isEditing

☐ Show details

Rules

Create SharePoint Folder
Render Form as PDF
Save PDF to FormFile field
Upload PDF to Document Library

New

Details for:
Upload PDF to Document Library

Condition:
FormFile is not blank and qRulesLink is blank

Rule type:
Action

Run these actions: *
Set a field's value: Command = concat("SaveToSharePoint /url=", SharePointSiteUrl, "Attachments/", AttachmentsFolder, " /xpath=/my:ExpenseReport/my:Form/my:FormFile")

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

- Create another rule and name it **Upload Receipt(s) to Document Library**. This rule will trigger the rules to upload the receipts to the document library.

Fields

Drag a field to add it to the form.

Fields:

FormLogic (Secondary)

FormLogic

- stop
- debug
- Actions**
 - GetInputParameter
 - SetReadOnly
 - SetCurrentUser
 - SetManagersInfo
 - Save
 - Submit
 - ShowMessage
 - GeneratePdf**
- CurrentState
- isEditing

☐ Show details

Rules

Render Form as PDF
Save PDF to FormFile field
Upload PDF to Document Library
Upload Receipt(s) to Document Library

New

Details for:
Upload Receipt(s) to Document Library

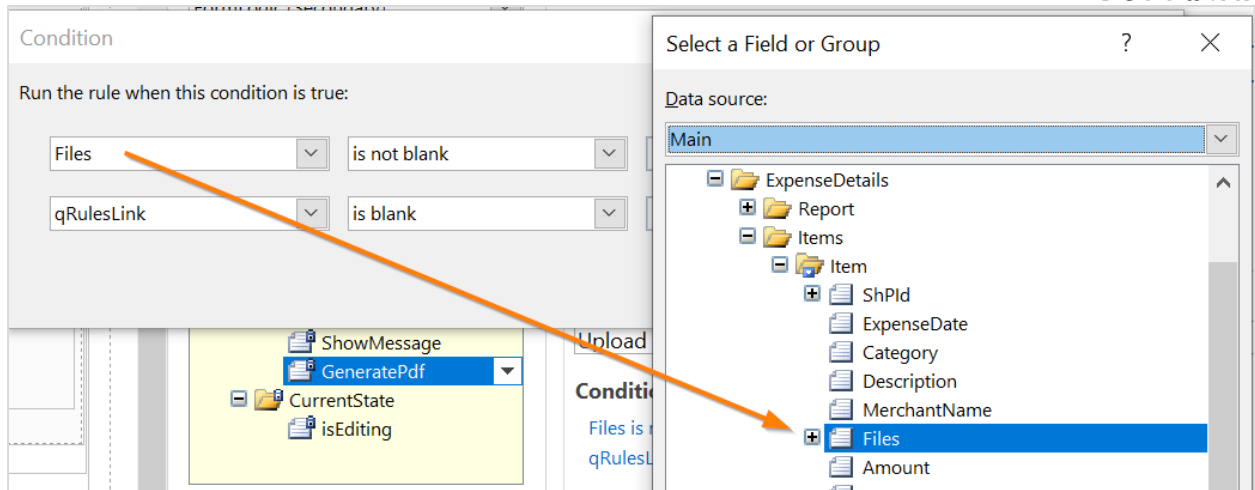
Condition:
None - Rule runs when field changes

Rule type:
Action

Run these actions: *
None

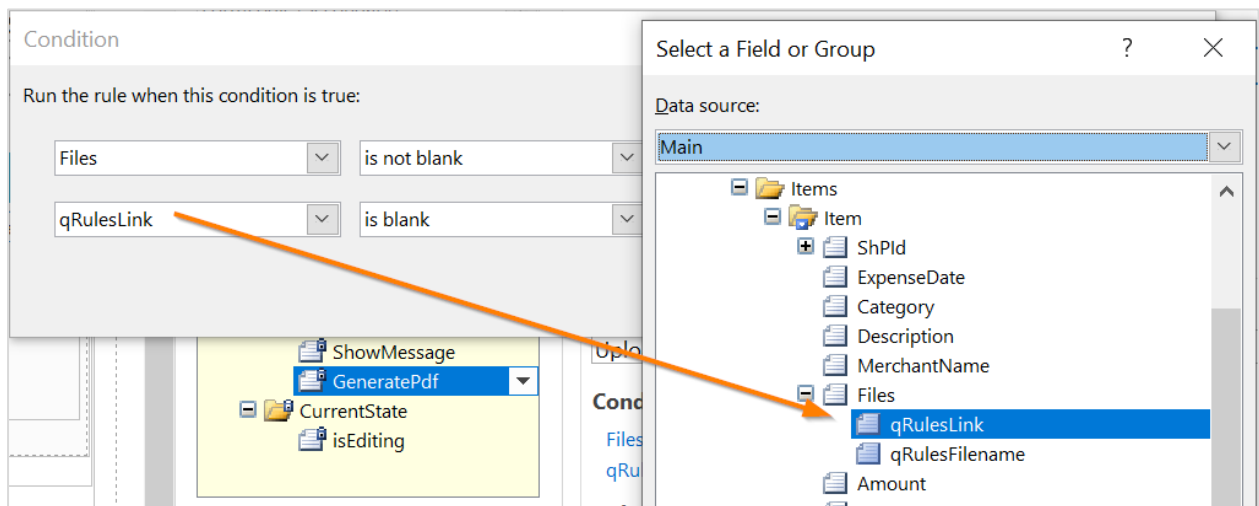
- In the rule, add the following condition:
Files is not blank AND qRulesLink is blank

Files XPath: /my:ExpenseReport/my:ExpenseDetails/my:Items/my:Item/my:Files



qRulesLink XPath:

/my:ExpenseReport/my:ExpenseDetails/my:Items/my:Item/my:Files/@my:qRulesLink

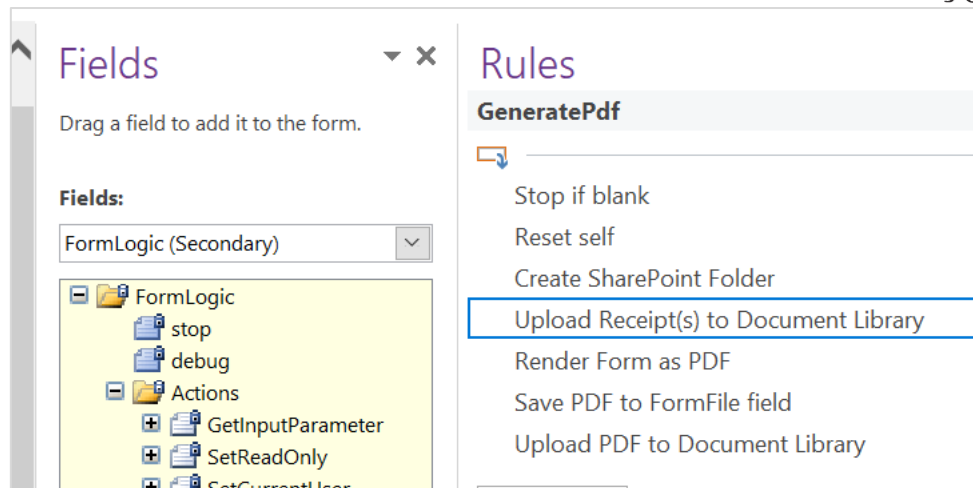


6. In the same rule, add an action to use the SaveToSharePoint command. Set the QdabraRules Command node with the command below:

```
concat("SaveToSharePoint /url=", SharePointSiteUrl, "Attachments/",  
AttachmentsFolder, "  
/xpath=/my:ExpenseReport/my:ExpenseDetails/my:Items/my:Item/my:Files  
/clear=false")
```

where SharePointSiteUrl points to /XtpLogic/Environment/SharePointSiteUrl of XtpLogic_DynamicDCs data source and AttachmentsFolder points to /my:ExpenseReport/my:Form/my:AttachmentsFolder.

7. Move the rule up right after the **Create SharePoint Folder** rule.



8. Save the changes and upload your form to FormsViewer.

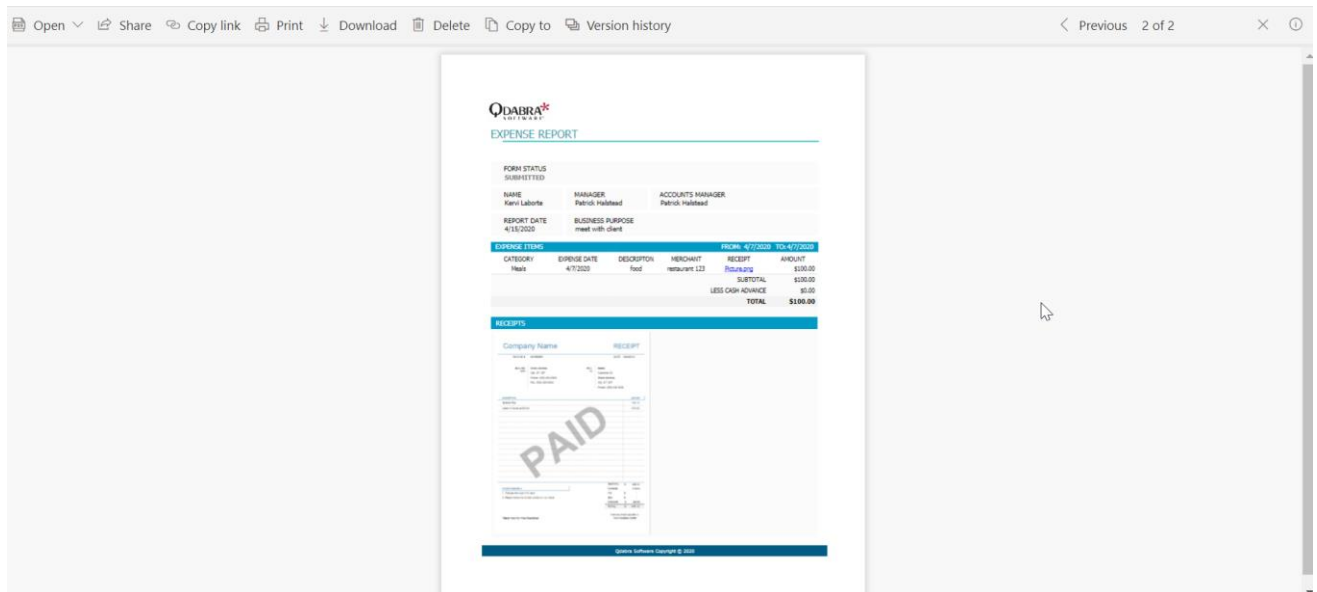
Test your form

1. Upload the XSN to the Expense Report Form template in FormsViewer.
2. Go to the **Expense Report** library and click **+New**.
3. Submit a new form and attach an image of a receipt.
4. Check the document library. You should find a folder that contains the PDF rendered form as well as the receipt attached in the form.

Attachments			
	Name ▾	Modified ▾	Modified By ▾
	 ER Kervi Laborte 2020-04-15	About a minute ago	Kervi Laborte

Attachments > ER Kervi Laborte 2020-04-15			
	Name ▾	Modified ▾	Modified By ▾
	 20200404185456429_Picture.png	About a minute ago	Kervi Laborte
	 20200404185459616_rendered.pdf	About a minute ago	Kervi Laborte

5. You will also see that the attached receipt is rendered in the PDF. Here's the PDF format of the Expense Report:



6. If you go to the Expense Report Library and select the form you just submitted, you will notice that the receipt was replaced with a link to its location in SharePoint document library.

QDABRA SOFTWARE Close

EXPENSE REPORT

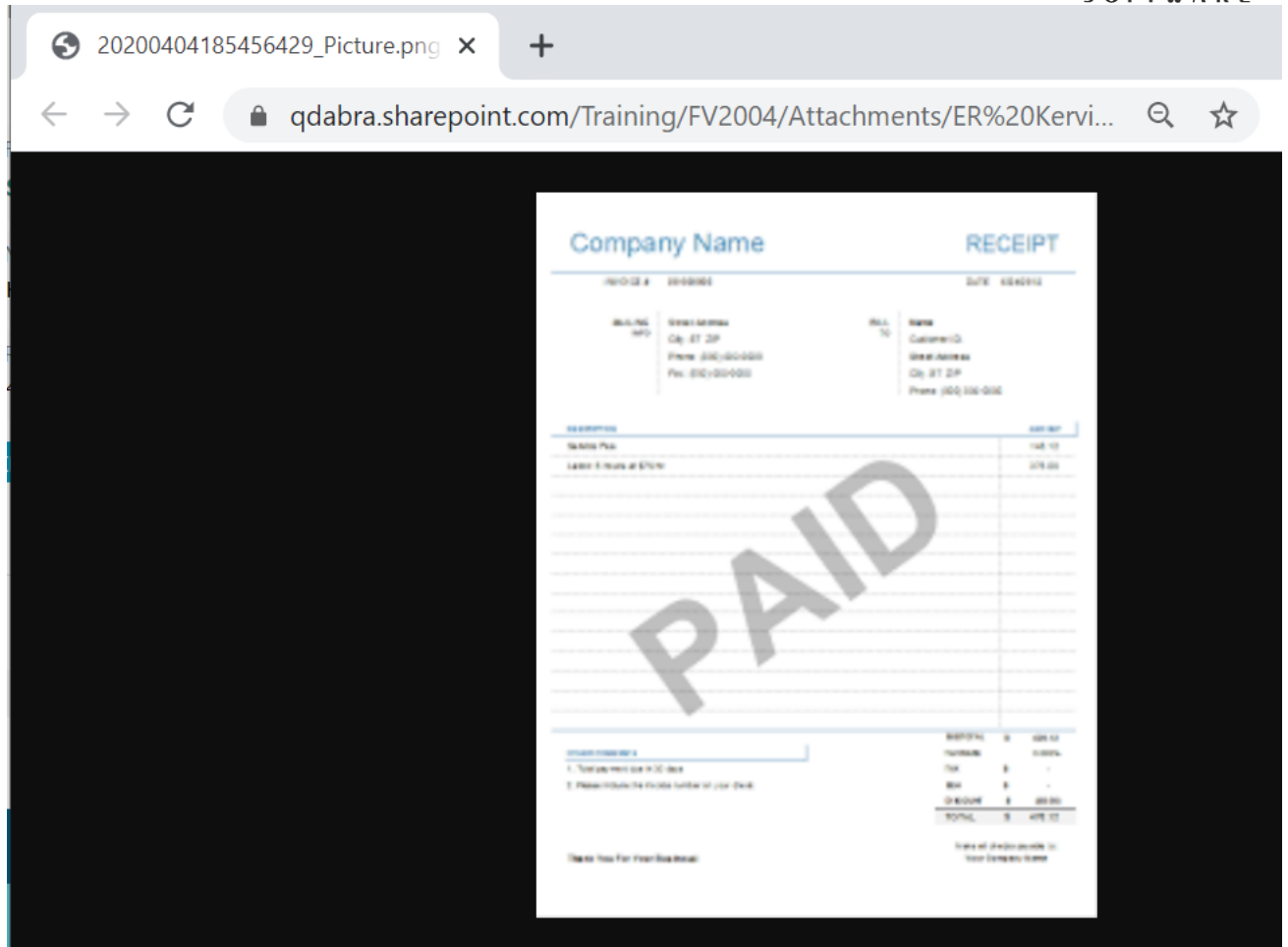
FORM STATUS: **SUBMITTED** Edit

NAME: Kervi Laborte
MANAGER: Patrick Halstead
ACCOUNTS MANAGER: Patrick Halstead

REPORT DATE: 4/15/2020
BUSINESS PURPOSE: meet with client

EXPENSE ITEMS						FROM: 4/7/2020	TO: 4/7/2020
CATEGORY	EXPENSE DATE	DESCRIPTION	MERCHANT	RECEIPT	AMOUNT		
Meals	4/7/2020	food	restaurant 123	Picture.png	\$100.00		
					SUBTOTAL	\$100.00	
					LESS CASH ADVANCE	\$0.00	
					TOTAL	\$100.00	

Solution Version: 1.0.1.1532
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Congratulations! You have successfully applied the saving of attachments feature in FormsViewer.

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