

DBXL XTP

📅 5/25/2023

Purpose

This document explains the DBXL XTP's primary uses and provides a simplified explanation of how to use it.

What it's all about

The DBXL XTP provides drop-in functionality to simplify the process of submitting to DBXL from new and existing form templates, and loading submitted DBXL documents into your form.

It uses the UserKey version of DBXL's GetDocument and SubmitDocument methods for this, which is recommended in FormsViewer.

It also provides an easy way to convert non-UserKey QueryDB connections to use the UserKey version of the QueryDB service.

Setup

Follow the steps in the How to Add a Template Part in InfoPath Form document, included with the XTP, to add the XTP to InfoPath designer, and then add it to your form.

The XTP includes detailed setup steps, which are added to your form's view when you add the XTP to it.

A high-level overview of these steps:

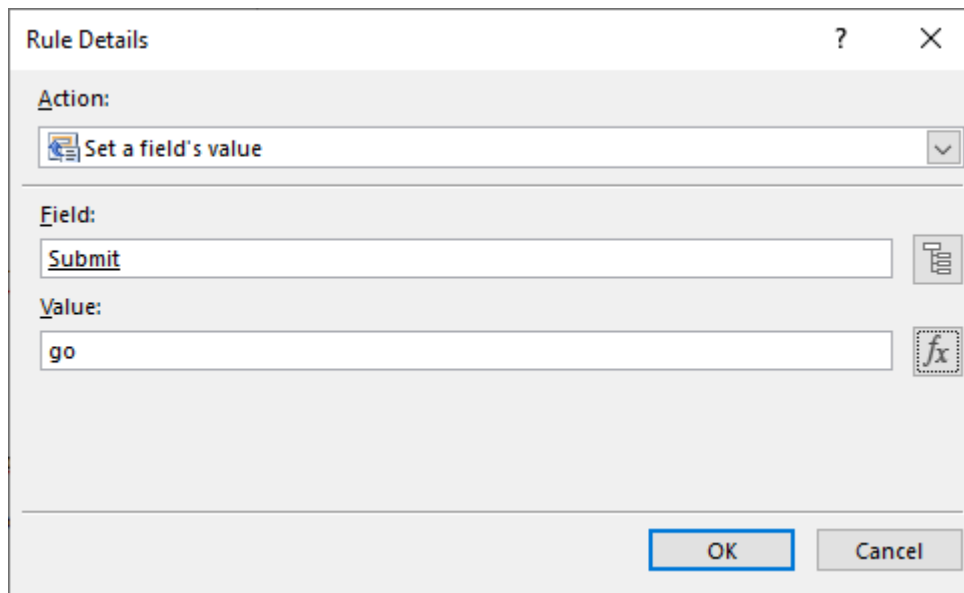
1. Set up Environment Variables.
 - a. The XTP takes advantage of FormsViewer's Environment Variables feature, which allows specifying necessary DBXL configuration values in FormsViewer's Manage Environment Variables page, so that you don't need to hardcode these values in your form. This helps save setup time and allows changing these values quickly and easily should they need to change.
 - b. Consequently, it's only necessary to carry out this part of the setup process once, not once per form.
2. Set up rule logic.

- a. Some rule logic is needed for the XTP's functionality to work. The necessary steps are detailed within the XTP.

3. Delete the XTP instructions when you are done.

Submitting to DBXL

The XTP includes functionality for submitting documents to DBXL. You can initiate this from any rule in the form by adding an action to set the `/XtpLogic/Actions/Submit` field in the `XtpLogic_Dbxl` data source to the value "go":



The screenshot shows a 'Rule Details' dialog box with the following fields:

- Action:** A dropdown menu showing 'Set a field's value'.
- Field:** A text box containing 'Submit'.
- Value:** A text box containing 'go'.

At the bottom right, there are 'OK' and 'Cancel' buttons.

The **Set Values for DBXL Submit** rule on this **Submit** field contains actions for setting the DocType, Name, Author, and Description fields.

When setting up the XTP, you should modify the first of these actions to set the DocType field to the name of the DBXL doctype that your form should submit to.

You can also optionally use static values or formulas to set the Name, Author, and Description fields using values in the form's data sources. These values will be stored as the submitted document's metadata in DBXL.

If your form already has functionality to submit to DBXL using the non-UserKey SubmitDocument method, you can modify your submit logic to use this **Submit** field instead.

Opening Documents from DBXL

The XTP includes functionality to load submitted documents from DBXL.

You can take advantage of this functionality by including a **docid=** parameter in the URL of the form when opening it from FormsViewer, and including the document id of the document to open.

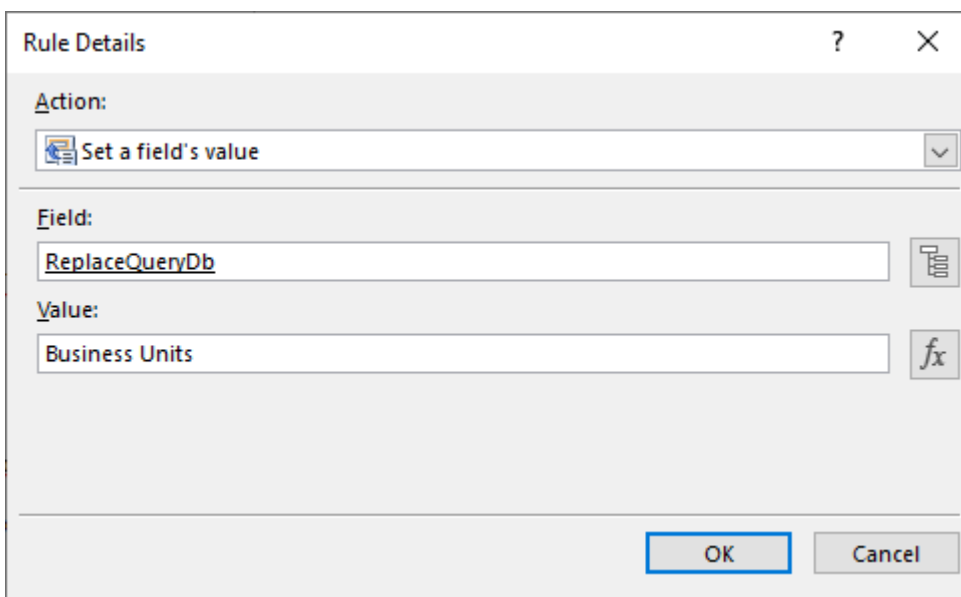
Example:

<https://qfs.formsqulo.com/FormsViewer/View?SPAppWebUrl=.....&templateName=MyTemplate&docid=12345>

Using Non-UserKey QueryDB Connections

As mentioned earlier in this document, we recommend using the UserKey version of DBXL's web methods to query DBXL from FormsViewer, but in the case that you are migrating a form that already has non-UserKey QueryDB connections, you can use this XTP to execute those connections using the UserKey version of QueryDB.

To do this, find any places in your form logic that execute its QueryDB connections, and replace their respective "Query using a data connection" rule actions with a "Set a field's value" rule action that sets the `/XtpLogic/Actions/ReplaceQueryDb` field in the `XtpLogic_DbxlXtp` data source to the *name* of the data connection to query:



The screenshot shows a 'Rule Details' dialog box with the following configuration:

- Action:** Set a field's value (selected from a dropdown menu)
- Field:** ReplaceQueryDb (text input field)
- Value:** Business Units (text input field)

At the bottom of the dialog are 'OK' and 'Cancel' buttons.

Setting this field to the relevant data connection name should cause the XTP logic to execute the query and populate the indicated data source with the query results.