



QDABRA QRULES

Use qRules to email a link to the xml document

So you have an InfoPath solution which you want to use in DBXL, and you want to send email on submit. This is easily accomplishable with InfoPath out of the box. Now let's say you wish to include a link to the xml document; we can accomplish this with qRules. [Before you continue, you may [read more about qRules here.](#)]

I'll go through a simple example on how this may be accomplished, by using the sample Expense Report form that comes with InfoPath 2007. Note that these steps assume that you have already installed DBXL v2.3 and qRules v1.7 (or newer) installed. Note that this scenario is only compatible with InfoPath 2007 because of qRules compatibility.

SAVE YOUR SAMPLE INFOPATH FORM TEMPLATE

1. Open InfoPath.
2. Click on **Design a Form Template**.
3. Click on **Customize a Sample**.
4. Select **Sample – Expense Report** and click **Design this form**.
5. Click **File | Save As**, and save the form template to your local drive.

INJECT QRULES INTO YOUR FORM

6. Open the qRules Injector.
7. Click **Browse** and select the form template saved in step 5.
8. Click **Inject**, and then click **OK** in the confirmation dialog.
9. Close the qRules Injector.

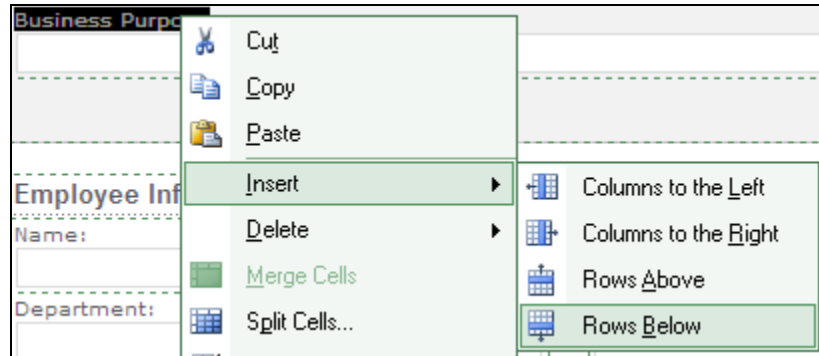
DESIGN THE FORM

10. Open your form in InfoPath in Design mode.
11. Add a Boolean node to your schema and call it displayURL. The default value should be False.

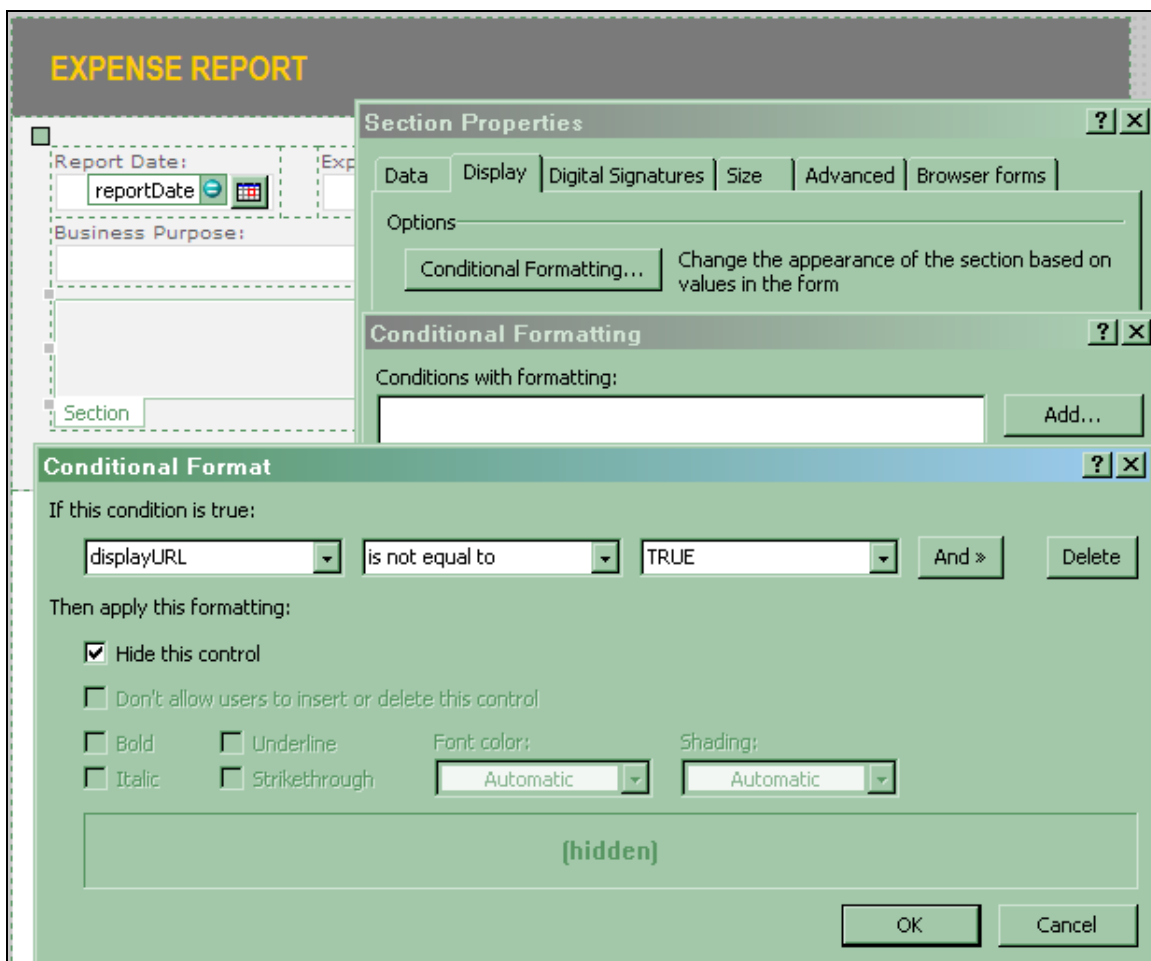
The screenshot shows the 'Add Field or Group' dialog box in InfoPath. The 'Name' field is set to 'displayURL'. The 'Type' is 'Field (element)'. The 'Data type' is 'True/False (boolean)'. The 'Data namespace' is empty. The 'Default value' is 'FALSE'. There are two unchecked checkboxes: 'Repeating' and 'Cannot be blank (*)'. The 'OK' and 'Cancel' buttons are at the bottom right.



12. Add a text Text(string) node to your schema and call it URL.
13. Insert a row below the Business Purpose field.



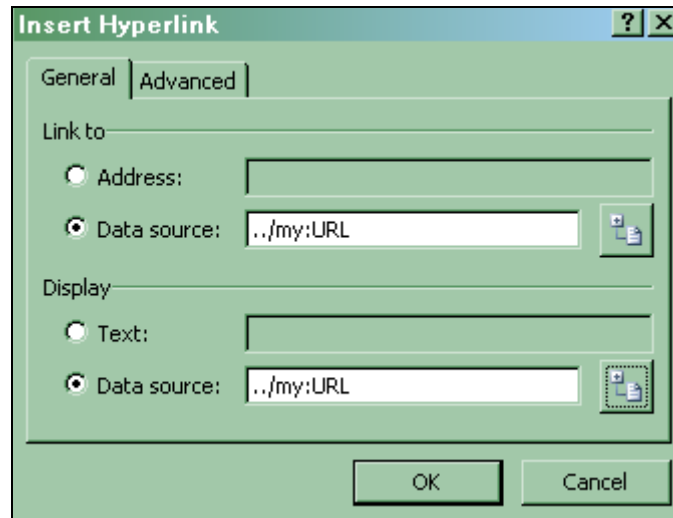
14. Enter a Section and add Conditional Formatting such that the section is hidden whenever the field displayURL field is not set to True.



15. Inside the Section, add an Expression box. It will have the value of `string("Click the URL below to open the form:")`.



16. Below the Expression box, add a Hyperlink that has the **Link to** and **Display** values both set to the field *URL*.



PREPARE THE DATA CONNECTIONS

17. Open **Tools | Data Connections** and remove the default data connection.
18. Click **Add**. Follow the Data Connection Wizard to create a Receive-type data connection to the web service **DBXLDocumentService** and select the operation **SubmitDocument**. Leave all parameters blank. Call this data connection *SubmitDocument* and uncheck the checkbox for “Automatically retrieve data when form is opened”.
19. Click **Add**. Follow the Data Connection Wizard to create a Submit-type data connection that submits an email. The email will be sent to the manager, with the employee copied (CC). You can set the subject as desired (see below for an example). Check the option to “Send the active view of the form and no attachment”.

20. Close the **Data Connections** menu.

DESIGN THE SUBMIT PROCESS OF THE FORM

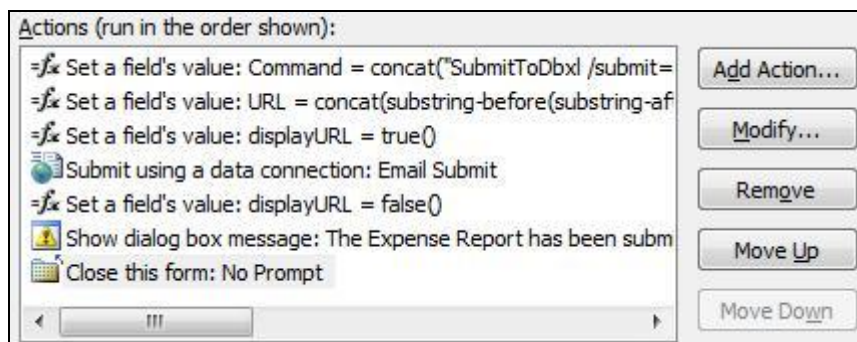


21. Double click on the Submit button and change the *Action* from **Submit** to **Rules and Custom Code**. Change the *Label* to **Submit**.
22. Click on **Rules**. Click on **Add** to create a new rule. We will add a total of seven rules.
 - a. The first rule will set the field Command, in the QdabraRules secondary data connection, to the following value: `concat("SubmitToDbxl /submit=SubmitDocument /name=", reportDate, " /author=", name, " /desc=", purpose)`. In this command, you can change the three xpath values as desired, to set the Name, Author and Description promoted as DBXL properties. Also, SubmitDocument is the receive-type data connection.

Note that /dsname is an optional parameter, and allows you to submit a datasource other than the main data source to DBXL. This can be used when you have child doctypes and have added their XML as a secondary data source. /doctype is another optional parameter and allows you to explicitly specify the doctype to submit to. This is necessary when the template is going to be accessed from somewhere other than DBXL (like SharePoint) or when you're submitting a data source other than the main data source.

Also note that you cannot use concat if any of the parameters are rich text. In that scenario, please use the parameters introduced in qRules v2.4 (explained in the qRules User Guide). For example: `SubmitToDbxl /submit=DBXLSubmit /namexpath=/my:myFields/my:AssignedToName /descxpath=/my:myFields/my:Comments`

- b. The second rule will set the value of URL in the Main DOM to the following value: `concat(substring-before(substring-after(/processing-instruction())[local-name(.) = "mso-infoPathSolution"], 'href="'), "/Forms/", "/Documents/", docId, "/", docId, ".xml")`. This statement generates the URL of the document by looking at the QdabraPI and the result of the first rule, which returned the DocID of the new document.
 - c. The third rule will set the value of displayURL to 'True', by using the function `true()`. We do this such that the optional section, showing the URL, is displayed before we send email.
 - d. The fourth rule will submit the form via email using the data connection you created in step 19.
 - e. The fifth rule will set the value of displayURL to 'False', by using the function `false()`. We do this to hide the section now that the email has been sent.
 - f. (optional) The sixth rule will display a dialog box message telling the user that the Expense Report form has been submitted.
 - g. (optional) The seventh rule will close the form.



TEST THE FORM

23. In DAT, click on New Configuration. Attach the Expense Report form you have created and give it a name, such as ExpenseReportqRules. Click **Save** and then click **OK** in the confirmation dialog.



24. Click the icon (📧) to open the form.
25. Fill out the form, noting that the manager email address and employees email address are required for our submit rules to work. Use your email address in either of these email fields such that you receive a copy of the email.
26. Click the submit button. The form will be submitted via qRules, an email message will be sent and the form will automatically close.
27. Check your email. You will see that it contains a link to the form.

And voila, mission accomplished. You'll have submitted the form to the DBXL web service and sent email to the user containing the URL. Of course, it may be possible to make further use of Active Directory to design workflow, but this we'll save for a future occasion.