



Product: Database Accelerator (DBXL) v2.4

Title: How to set up a SharePoint Mapping using Content Types

One of the new features of DBXL v2.4 is the ability to map your xml documents to a content type published in SharePoint. This new feature is illustrated in this tutorial. It provides step-by-step procedures which will guide you on how to setup a SharePoint mapping in DBXL using a content type.

TABLE OF CONTENTS

PRE-REQUISITES.....	1
DECLARE DOCUMENT TYPE INTO AN XML	2
CREATE A SUBMIT DATA CONNECTION TO DBXL	3
CONFIGURE THE CONTENT TYPE IN SHAREPOINT	5
PUBLISH THE FORM TEMPLATE AS CONTENT TYPE	5
CREATE A NEW FORM LIBRARY	7
CONFIGURE THE DOCUMENT TYPE IN DBXL.....	9
CREATE A NEW DOCUMENT TYPE	9
CREATE THE SHAREPOINT MAPPING	9
TEST THE SOLUTION.....	11

PRE-REQUISITES

- InfoPath 2007 or InfoPath 2010
- DBXL v2.4
- SharePoint 2007 or SharePoint 2010



<http://www.qdabra.com>

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DECLARE DOCUMENT TYPE INTO AN XML

We will begin by declaring the document type name into an XML. Declaring the document type name in XML is required *if your form has code*. You can skip this section if your form is code-free.

1) Declare Document Type Name in XML.

- a. Create an xml file with one node, which declares the name of the Document Type that you will be using. Its contents may look like this:

```
<declaration>  
    <doctype>appendChild</doctype>  
</declaration>
```

- b. Save this xml document to your local drive.
- c. Open the form template in design mode in InfoPath.
- d. Click on **Tools > Data Connections** and click **Add**.
- e. Select **Create a new connection to** and select **Receive data**. Click **Next**.
- f. Select **XML document** and click **Next**.
- g. Click Browse and select the xml file that you created in step 3a.
- h. Click **Next** twice and then click **Finish**. If you receive a warning, click Ignore.



CREATE A SUBMIT DATA CONNECTION TO DBXL

- 1) Create a submit data connection.
 - a. Select **Tools > Data Connections** and click **Add**.
 - b. Select **Create a new connection to** and select **Submit data**. Click **Next**.
 - c. Select **To a Web service** and click **Next**.
 - d. Enter the URL to the DBXLDocumentService, usually `http://<servername>/QdabraWebService/DBXLDocumentService.asmx`, and click **Next**.
 - e. Select **SubmitDocument** from the list of operations and click **Next**.
 - f. Double click the *tns:docTypeName* parameter and select the secondary xml connection from the data source dropdown.
 - g. Expand the tree to display the node, select the doctypename node, check the checkbox for *Submit data as string* and click **OK**.
 - h. Select the *tns:xml* parameter, select the **Entire form** toggle, and check the checkbox for **Submit data as string**.
 - i. Double click the *tns:name* parameter and select the field Name from the main data source. Check **Submit data as a string**.
 - j. Double click the *tns:author* parameter and select the field Author from the main data source. Check **Submit data as a string**.
 - k. Double click the *tns:description* parameter and select the field Description from the main data source. Check **Submit data as a string**.
 - l. Click **Next**, enter a name for the submit data connection, and then click **Finish**. If you receive a warning, click Ignore. Then close the data connections dialog box.
- 2) Configure a Submit button.
 - a. Add a button and double click on it to open the Button Properties.
 - b. Change the **Action** dropdown to Submit and click on **Submit Options**.
 - c. Check the checkbox for **Allow users to submit this form** and select **Web Service** from the



Send form data to a single destination dropdown.

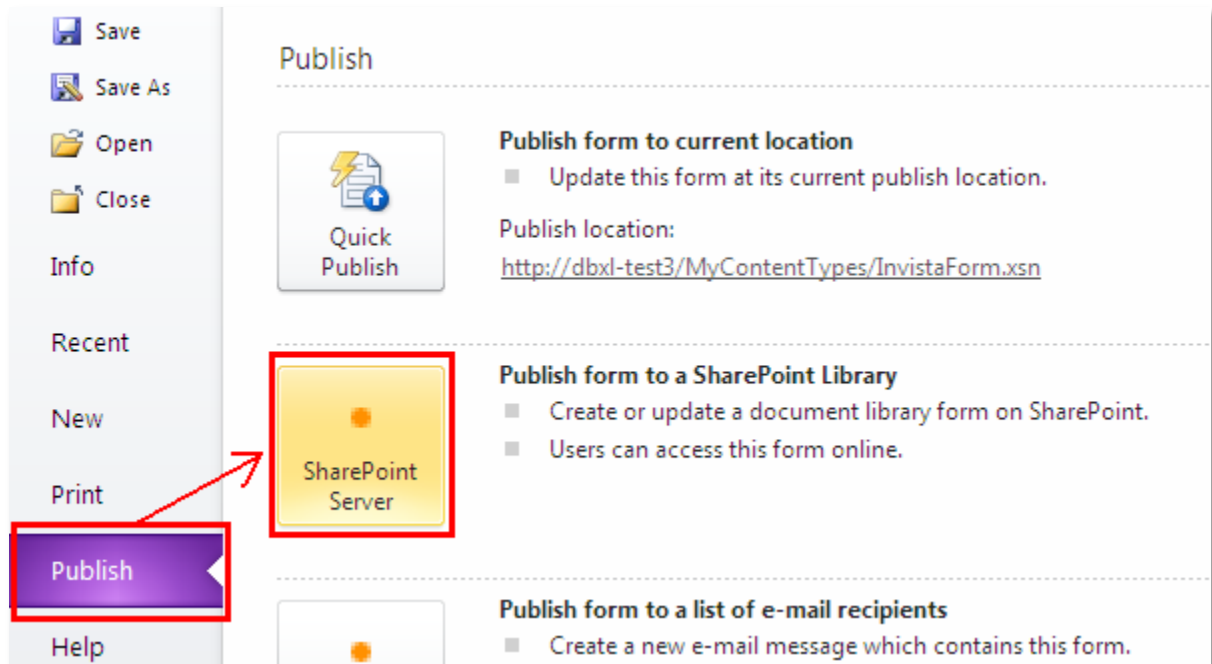
- d. Make sure that the Web Service submit data connection created in step 4 is selected in the **Choose a data connection for submit** dropdown.
 - e. Click **OK** twice to close the dialogs.
- 3) Save the XSN in your local drive.



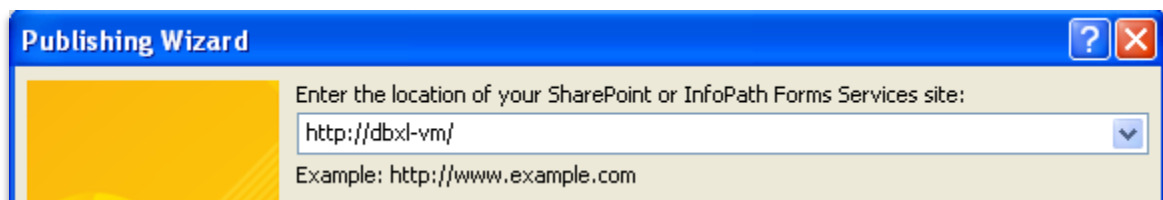
CONFIGURE THE CONTENT TYPE IN SHAREPOINT

PUBLISH THE FORM TEMPLATE AS CONTENT TYPE

- 1) In InfoPath, select Publish > SharePoint Server.

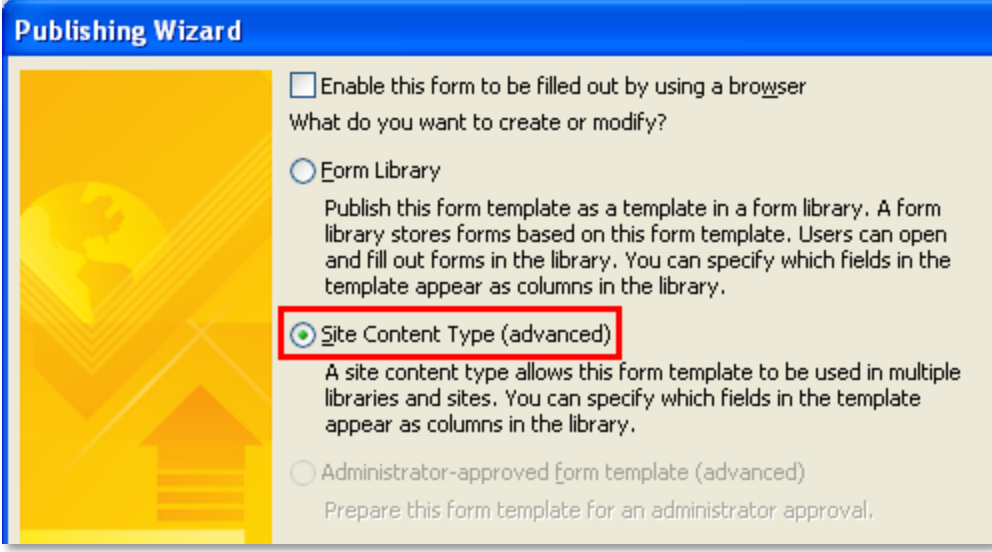


- 2) In the *Publishing Wizard*, enter the SharePoint server root where you want to publish the form template. Click **Next**.



- 3) In the next window, select **Site Content Type** option, and then click **Next**.





Publishing Wizard

☐ Enable this form to be filled out by using a browser

What do you want to create or modify?

☐ Form Library

Publish this form template as a template in a form library. A form library stores forms based on this form template. Users can open and fill out forms in the library. You can specify which fields in the template appear as columns in the library.

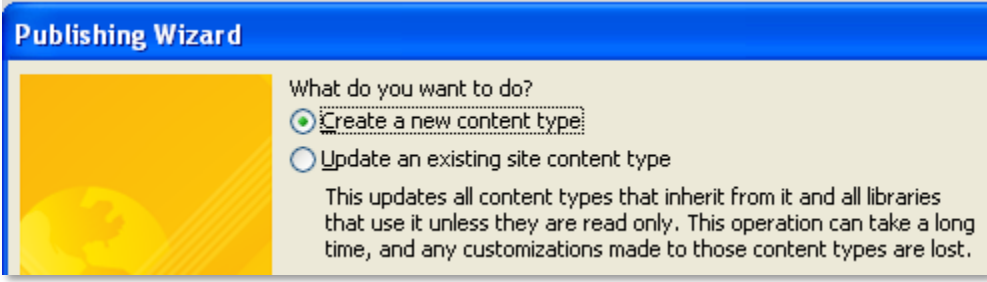
☒ Site Content Type (advanced)

A site content type allows this form template to be used in multiple libraries and sites. You can specify which fields in the template appear as columns in the library.

☐ Administrator-approved form template (advanced)

Prepare this form template for an administrator approval.

- 4) Next, you may opt to create a new content type or update an existing one in your site. In this case, we are creating a new content type.



Publishing Wizard

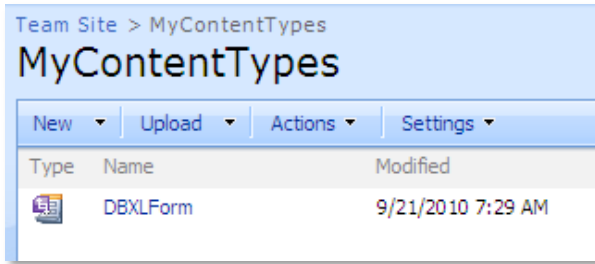
What do you want to do?

☒ Create a new content type

☐ Update an existing site content type

This updates all content types that inherit from it and all libraries that use it unless they are read only. This operation can take a long time, and any customizations made to those content types are lost.

- 5) In the next window, enter a name for your content type. Click **Next**.
- 6) Specify a location and file name for the form template (e.g. <http://dbxlv.com/MyContentTypes/Forms/DBXLForm.xsn>), and then click **Next**.
- 7) When asked to choose the columns you want to display in the SharePoint library, add the fields and click **Next**.
- 8) Click **Publish**. When done, click **Close**. Your form template will be published as content type:



Team Site > MyContentTypes

MyContentTypes

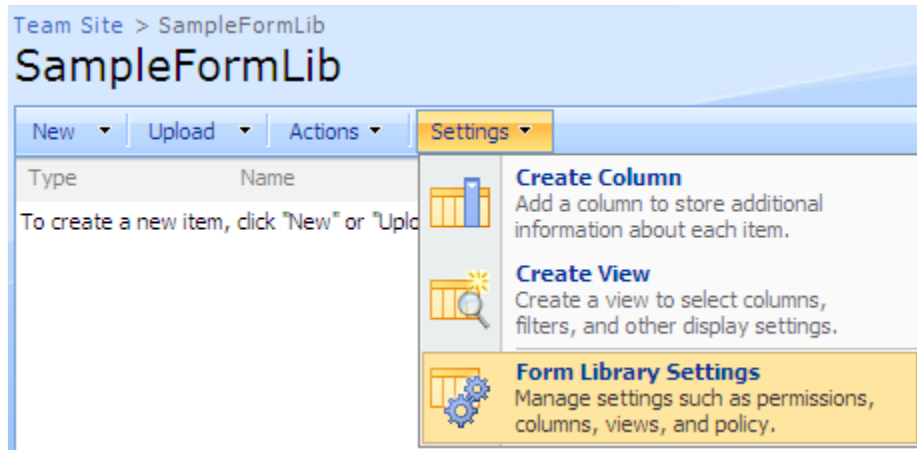
New | Upload | Actions | Settings

Type	Name	Modified
	DBXLForm	9/21/2010 7:29 AM

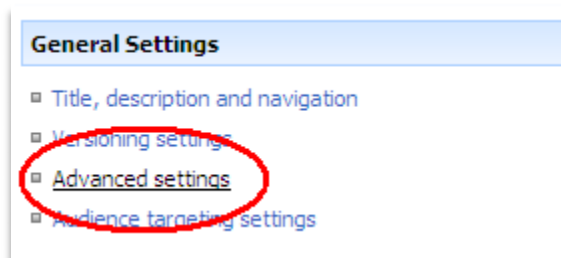


CREATE A NEW FORM LIBRARY

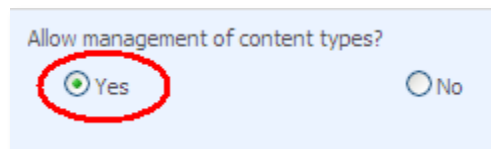
- 1) Create a new form library.
- 2) In your form library, select **Settings > Form Library Settings**.



- 3) Under General Settings, click **Advanced settings**.



- 4) Select **Yes** to allow management of content types, then click **OK**.



- 5) Back in the Form Library Settings, select **Add from existing site content types** under *Content Types* section.



Content Types

This document library is configured to allow multiple content types, policies, workflows, or other behavior. The following content types

Content Type	Visible on New Button
Form	✓

☐ [Add from existing site content types](#)
☐ [Change new button order and default content type](#)

- 6) In the *Add Content Types* page, select the content type that was published in the SharePoint site and click **Add**. Click **OK**.
- 7) Back in the Form Library Settings, select **Change new button order and default content type** under the *Content Types* section.

Content Types

This document library is configured to allow multiple content types, policies, workflows, or other behavior. The following content types

Content Type	Visible on New Button
Form	✓
DBXLForm	✓

☐ [Add from existing site content types](#)
☐ [Change new button order and default content type](#)

- 8) Uncheck **Form** as default content type and click **OK**.

Visible	Content Type	Position from Top
☐	Form	1 ▼
☒	DBXLForm	2 ▼

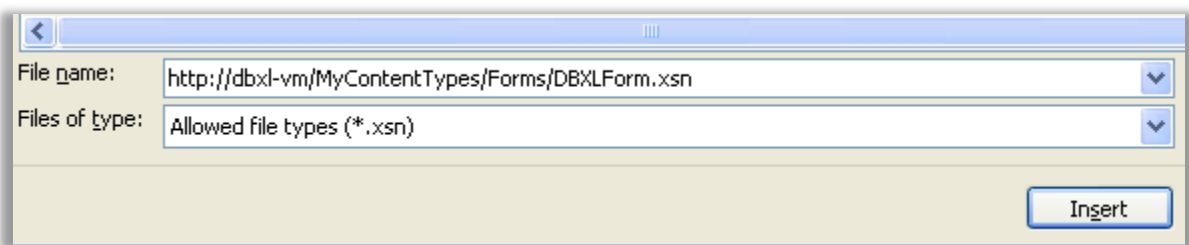
OK Cancel



CONFIGURE THE DOCUMENT TYPE IN DBXL

CREATE A NEW DOCUMENT TYPE

- 1) Open the DBXL Administration Tool or DAT.
- 2) Click **New Configuration**.
- 3) Click the XSN File attachment field.
- 4) In the File name field, enter the URL to your content type.



File name:

Files of type:

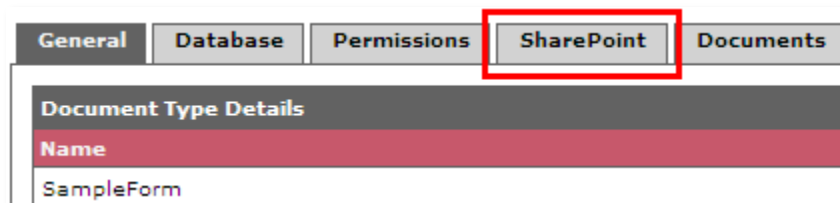
- 5) Click **Insert**. Your content type will be attached to DBXL.
- 6) Enter a name for the Document Type.

NOTE: If your form has code, make sure that your Document Type name matches the same name that was hardcoded in your XML file.

- 7) Click **Save**.

CREATE THE SHAREPOINT MAPPING

- 1) Click on the **SharePoint** tab.



General Database Permissions **SharePoint** Documents

Document Type Details

Name

SampleForm

- 2) Click **Insert Mapping**.



General	Database	Permissions	SharePoint
SharePoint List or Library (i.e. Collection) Specify SharePoint lists and/or libraries that you would like to use for SharePoint features such as Workflow and Form Server for InfoPath or browser (browser based forms), the Qdabra the order specified below.			
Mappings Allowed		2	Remaining
☒ Insert Mapping			
☐ Fail Submit on Promoted Property Error			

3) Enter the URL to the form library you created earlier.

URL	Method
http://dbxl-vm/SampleFormLib/Forms/AllItems.aspx	Object Model
Expression Insert Expression	
☐ Publish Library and XSN ☐ Use Forms Services ☐ Propagate Deletes ☐ Asynch ☐ Content Type	

4) Check **Content Type** check box.

URL	Method
http://dbxl-vm/SampleFormLib/Forms/AllItems.aspx	Object Model
Content Type Url	
Expression Insert Expression	
☐ Publish Library and XSN ☐ Use Forms Services ☐ Propagate Deletes ☐ Asynch ☒ Content Type	

5) Enter the Url to your content type (e.g. <http://dbxl-vm/MyContentTypes/Forms/DBXLForm.xsn>)

6) Your mapping should now look like this:

URL	Method
http://dbxl-vm/SampleFormLib/Forms/AllItems.aspx	Object Model
Content Type Url	
http://dbxl-vm/MyContentTypes/Forms/DBXLForm.xsn	
Expression Insert Expression	
☐ Publish Library and XSN ☐ Use Forms Services ☐ Propagate Deletes ☐ Asynch ☒ Content Type	

7) Click **Save**.



TEST THE SOLUTION

- 1) In Internet Explorer, open the SharePoint form library you created.
- 2) Click on New. Fill out the form and click Submit.
- 3) You can open, edit and re-submit the documents by clicking on each item in the SharePoint library.
- 4) In DBXL, click new to open a blank form. Fill out the form and click Submit.

NOTE: When your form has code, do not click New in DBXL. Instead, click on the Download () button.

- 5) You can open, edit and re-submit the documents via their document handler URL, that is, <http://<servername>/QdabraWebService/Documents/<docID>/<docID>.xml>, or by selecting them from the Documents tab in DAT.

