



Working with locally-saved copies of DBXL documents

If you like to save copies of your documents locally, you need to make sure that they have been submitted to DBXL first such that they have the Qdabra PI stored in the XML. Specifically important are the Document Type Name and DocID. In general, the process is the following:

1. Create the document by opening the template from DBXL.
2. Fill in all the required information.
3. Submit the form (such that the form is uploaded to DBXL).
4. Close the form.
5. Open the form from DBXL.
6. Save the form to your local hard drive.

Then, when you wish to update the document stored in DBXL:

1. Open the local version of the document.
2. Perform any necessary edits/modifications.
3. Upload the new version of the document (by clicking the Submit button).
4. When closing InfoPath, you may be given the chance to save the new version of the document locally.

MIGRATION

For migrating local copies of your forms into a new environment the steps are more involved. Note: this only applies if the local version is “newer” than the version that was migrated using DocDeployer.

1. Open the document from the new environment and save it to your desktop.
2. Open the XML in Notepad.
3. Copy the <?QdabraDBXL?> PI from the very top of the file.
4. Open the XML file for your local copy in Notepad.
5. Replace the <?QdabraDBXL?> in your “old” local copy with the “new” PI that you copied from the version you pulled down from DBXL in step 3.
6. Close all instances of Notepad.
7. Double-click your “old” local copy (which now has the “new” PI).
8. Click the “Save” button inside the form to upload it to DBXL.

This will overwrite the version that is currently in DBXL.



NOTES

- Be careful when submitting a document from its locally saved version to the DBXL version. In doing so you could be overwriting someone else's edits! For example, if you saved a local version of DocID 13, then another user edits that same document, your local copy will not be in sync with the changes made by the other user.
- When submitting a Document to DBXL, the DocId attribute of the QdabraDBXL PI is read before all others and is not validated on submission. Submitting a Document with a the value of the DocId attribute set to the value of an existing Document ID in DBXL will always overwrite it, even if the DocType attribute has the value of a Document Type that does not match the DocID.

