Create a Content Type Mapping for a solution that contains code

You can now integrate your browser-enabled qRules form or forms that have custom code using the content type mapping in DBXL! This is previously done by using the qRules command called SwapDOM. Now with the content type mapping feature, DBXL makes it possible to do this without the use of qRules.

PRE-REQUISITES

- InfoPath 2007 or InfoPath 2010
- DBXL v2.6
- SharePoint 2007 or SharePoint 2010 with InfoPath Forms Services

DECLARE THE DOCUMENT TYPE NAME IN XML

We will begin by declaring the Document Type name to XML

1. Create an xml file with one node, which declares the name of the Document Type that you will be using.

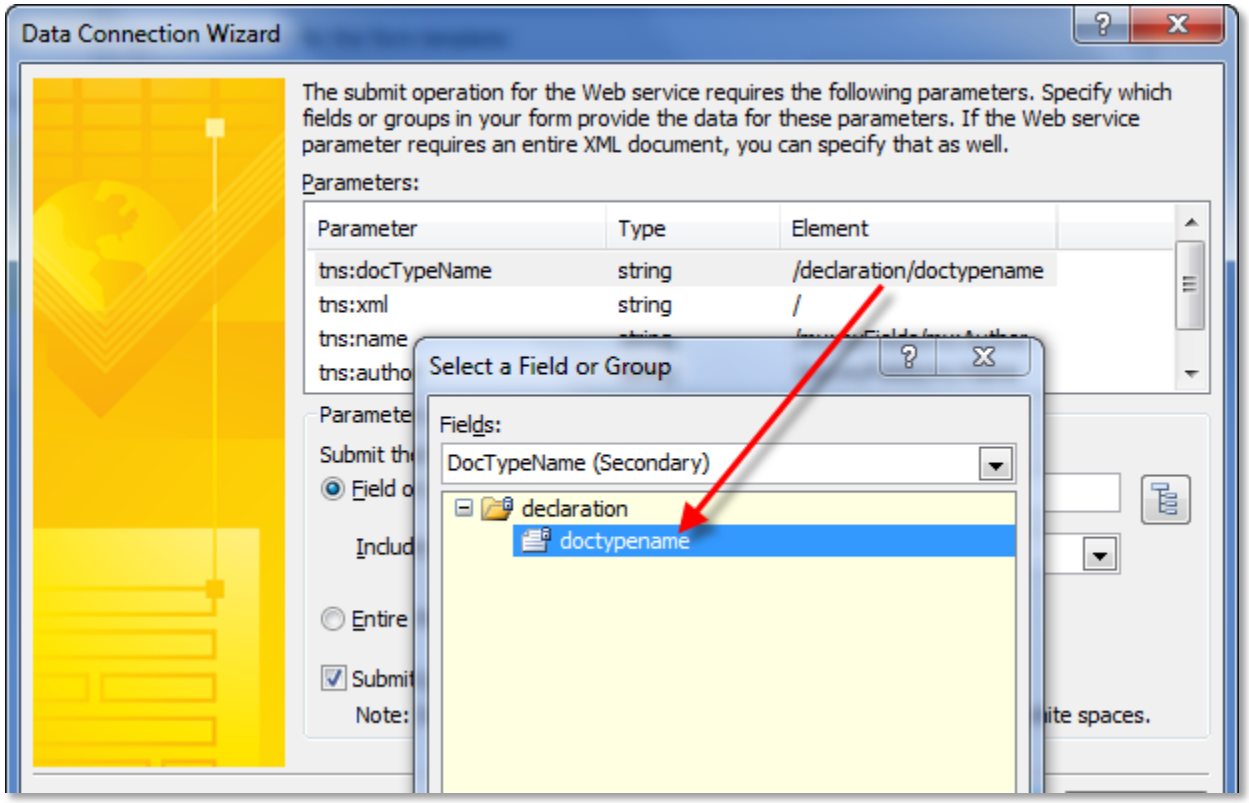
   Its contents may look like this:

   ```
   <declaration>
       <doctypename>qRulesForm</doctypename>
   </declaration>
   ```
2. Save this xml document to your local drive.
3. Open the form template in design mode in InfoPath.
4. Go to **Data** tab → **Data Connections** and click **Add**.
5. Select **Create a new connection to** and select **Receive data**. Click **Next**.
6. Select **XML document** and click **Next**.
7. Click *Browse* and select the xml file that you created in step 2.
8. Click **Next** twice and then click **Finish**. If you receive a warning, click Ignore.

CREATE A SUBMIT DATA CONNECTION TO DBXL

For steps, please refer to DBXL's Getting Started Guide.

When you reach the parameter's section, make sure to select the *doctypename* node in your secondary data connection:

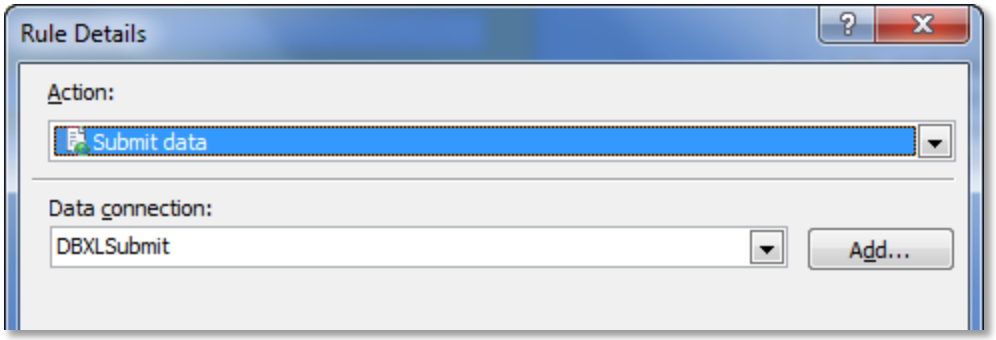


Your parameters should look something like:

Parameter	Type	Element
tns:docTypeName	string	/declaration/doctypename
tns:xml	string	/
tns:name	string	/my:myFields/my:Author
tns:author	string	/my:myFields/my:Name
tns:description	string	/my:myFields/my:Description

ADD THE DBXL SUBMIT DATA CONNECTION TO YOUR SUBMIT BUTTON

1. Add a button and in the *Home* tab, click on *Manage Rules.*
2. Add an action that submits data to DBXL.

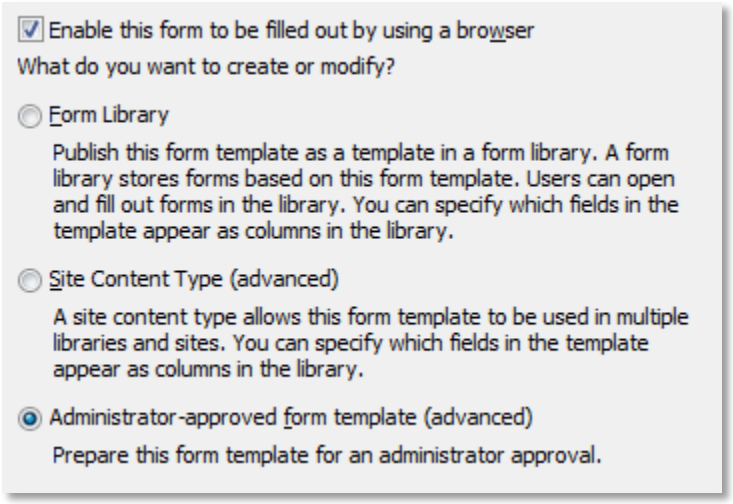


3. Save the XSN in your local drive.

PUBLISH FORM AS ADMIN-APPROVED FORM TEMPLATE

Since qRules injects code into your form, you will have to publish your form as an admin-approved form template.

1. In InfoPath's menu, go to **File → Publish → SharePoint Server**.
2. Enter your SharePoint server URL and click **Next**.
3. Select the option to publish the form template 'To a SharePoint Server with or without InfoPath Forms Services' and click **Next**.
4. The next page will allow you to publish your form as an **Administrator Approved form template**. Make sure that option is selected and click **Next**.

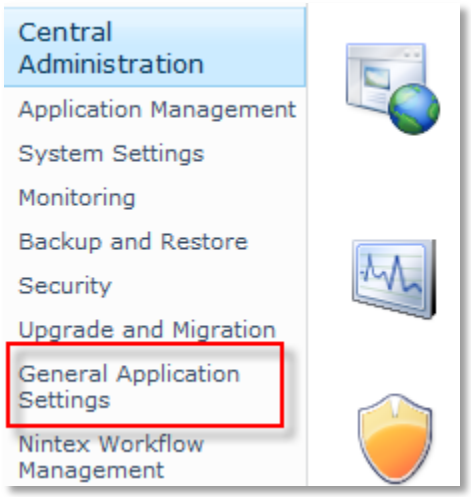


5. In the next window, you will be asked to specify a location and filename for the form template. Browse to the local or network location where you wish to save your published form template to. Make sure that this location is accessible to your SharePoint Administrator. Click **Save** and then click **Next**.
6. Add some columns to be promoted to the SharePoint library and click **Next**, and then click **Publish**.
7. You will see a message that your form was published successfully and you are to give your SharePoint Administrator the information listed on the screen.
8. Click **Close** and close **InfoPath**.

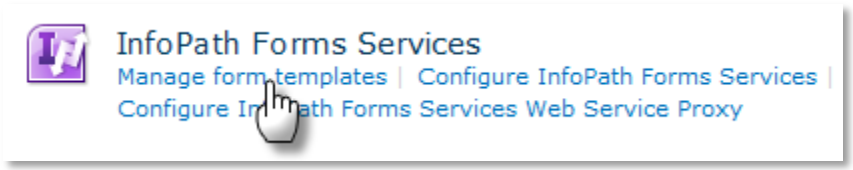
You should be a SharePoint Administrator with access to SharePoint Central Administration to complete the next steps.

SERVER-SIDE STEPS (SHAREPOINT ADMINISTRATOR)

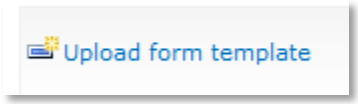
1. Navigate to the *Central Administration* web site.
2. Click on the **General Application Settings**.



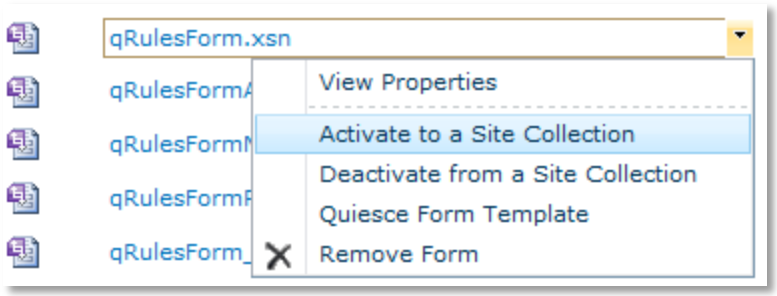
3. Under *InfoPath Forms Services*, click **Manage form templates**.



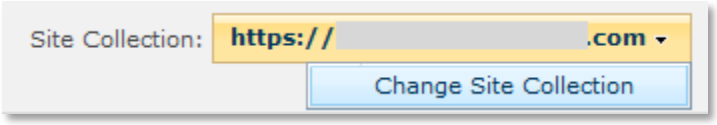
4. In the *Manage Form Templates* page, click **Upload form template**.



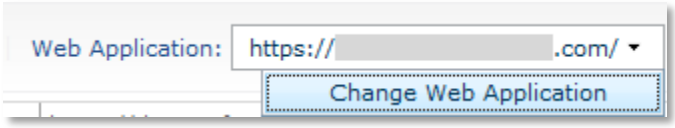
5. In the *Upload Form Template* page, browse to the location where you saved your published form template and click **Save**.
6. Accept the other defaults and click **Upload**. You should see a message indicating a successful upload. Click **OK**.
7. In the *Manage Form Templates* page, click on the down arrow next to the template that you just uploaded and select **Activate to a Site Collection**.



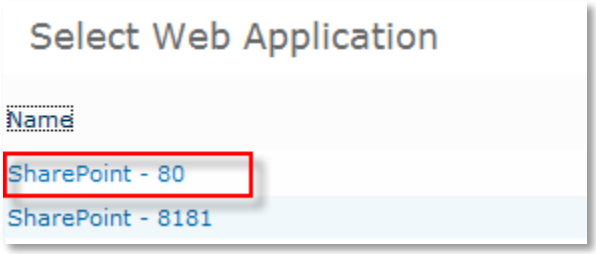
8. If the Activation Location shows an incorrect site, click on the down arrow next to **Site Collection** and select **Change Site Collection**. (Note: SharePoint almost always defaults to the *wrong* site collection the first time a form template is activated).



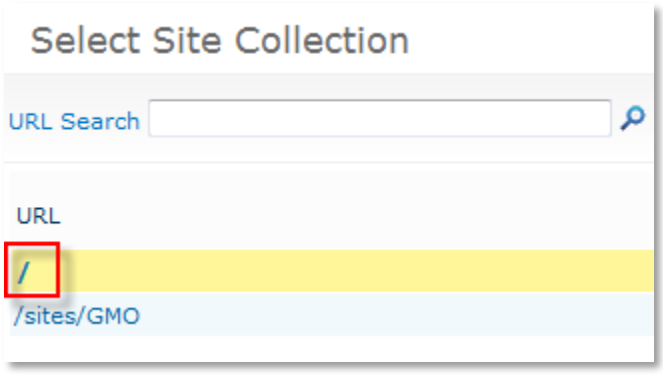
9. The *Site Collection* Webpage Dialog will open. Click the **Web Application** selector menu and choose **Change Web Application**.



10. Click **SharePoint – 80**.



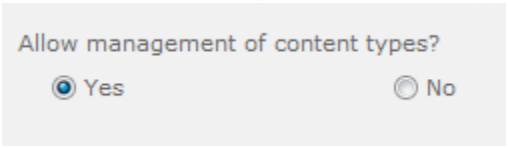
11. You will be directed back to the *Site Collection*, here click the **/** site to activate to the entire site collection. After clicking, the window will refresh quickly. Click **OK**.



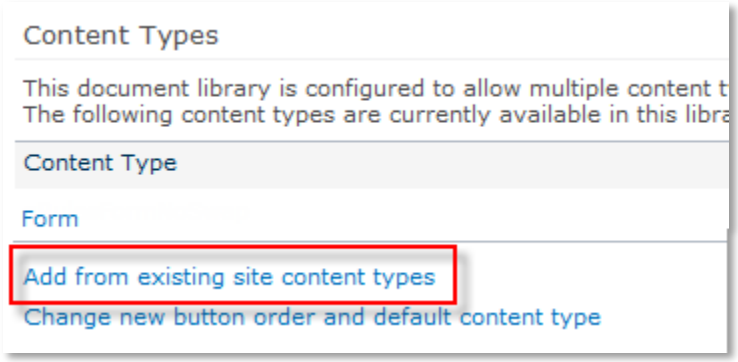
12. Click **OK** once again.
13. Close the *Central Administration*.

CONFIGURE CONTENT TYPE IN FORM LIBRARY

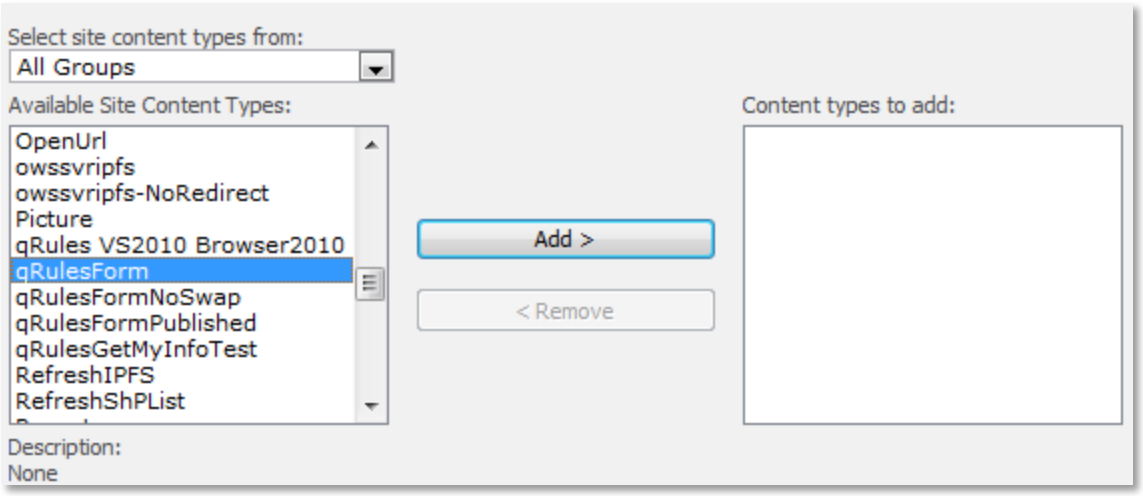
1. Go to the SharePoint site collection on which you activated the form template.
2. Browse to the SharePoint library where you want to use the form.
3. Go to the *Library* tab and click on **Library Settings**.
4. Click on **Advanced Settings** in the *General Settings* section.
5. Under *Content Type* section, select *Yes* to allow management of content types. Click **OK**.



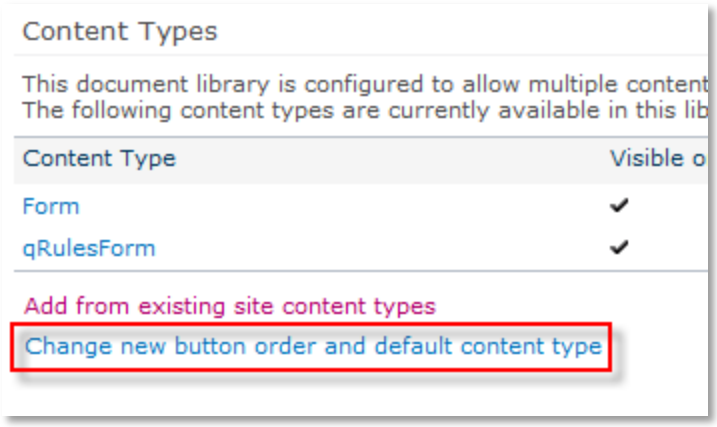
6. Back in the *Form Library Settings*, you will now be able to add a content type. Scroll down and you'll see the content type section.
7. Select Add from existing site content types.



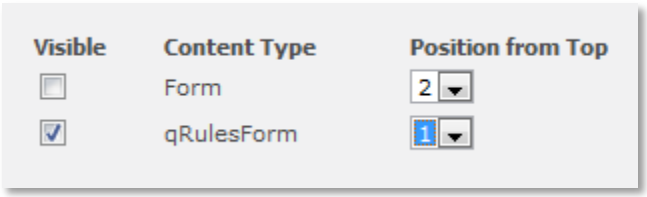
8. Select the activated form template under *Available Site Content Types* list box and then click **Add >** button. Click **OK**.



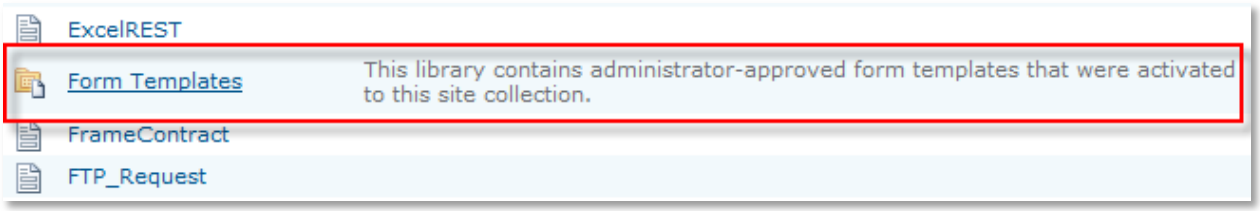
9. Now that you've added the content type, you need to make it the default content type of your form library. Click on *Change new button order and default content type.*



10. Uncheck the check box next to *Form.* Change the position of your content type to 1. Click **OK**.



11. Once you're done, click on **Site Actions → View All Site Content**.
12. Locate **Form Templates** under *Document Libraries* and click on it. This library contains all form templates that were activated in the site collection, as the description indicates.



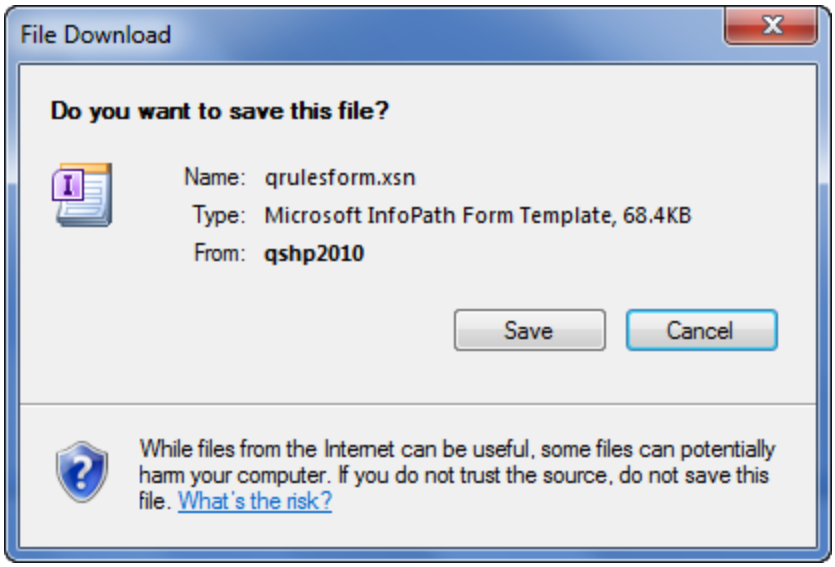
13. Find the form template that you activated in the site. Take note of the filename.
14. Now, grab the URL out of the address bar and copy it just before Forms/All%20Forms.aspx, so you'll have: http://<servername>/FormServerTemplates/

    You can paste it in a text editor like Notepad, for later use.

15. Append the filename of your form template to this URL: http://<servername>/FormServerTemplates/<FormName>.xsn

    Take note of this URL as you'll need this in the following section.

16. To verify that you have the correct link, enter the full URL from step 15 in the address bar of your browser. If it's correct, it should prompt you to download the form template, like this:

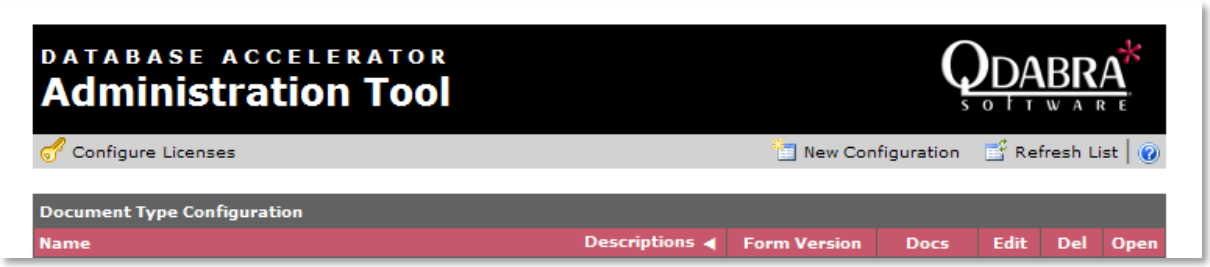


17. Click Cancel in the pop-up window.

CONFIGURE A DOCUMENT TYPE IN DBXL

The following steps require that you are a DBXL Admin.

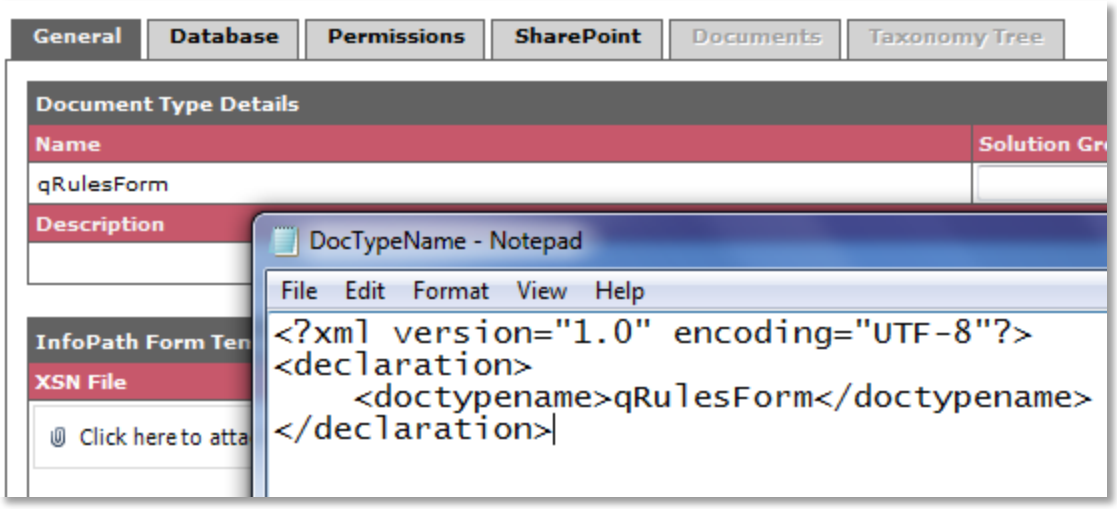
In this section, we will use the DBXL Administration Tool (DAT). Access it through Internet Explorer by entering the URL ***http://<servername>/QdabraWebService/default.htm*****.** Once the page opens, click the DBXL Administration Tool hyperlink. InfoPath should open a form similar to the one below:



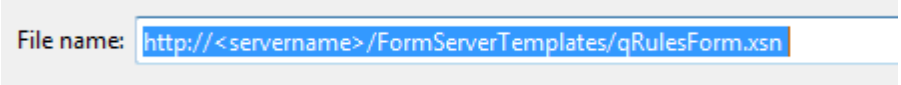
1. Click on **New Configuration** located near the upper right corner.

2. By default, you'll be directed to the *General* tab.

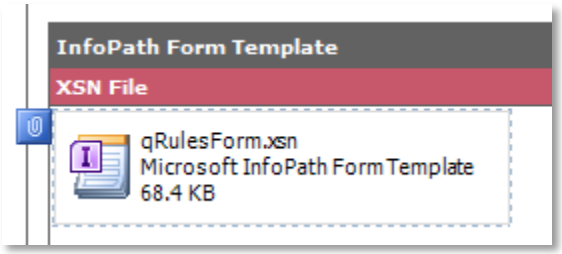
3. Enter a Document Type name. Here, make sure that it matches the doctype name in your XML configuration.



4. Under InfoPath Form Template, click on **Click here to attach a file**.
5. In the previous section, you took note of the URL to your administrator-approved template. Copy that URL and enter it in the File name field of the Attach File window.



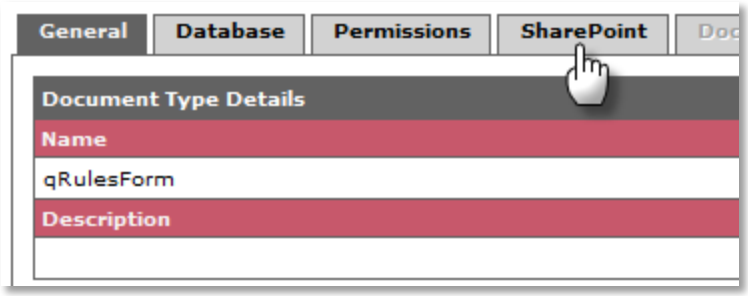
6. Click **Open**. DAT will start looking for the file in SharePoint and it will attach the form template.



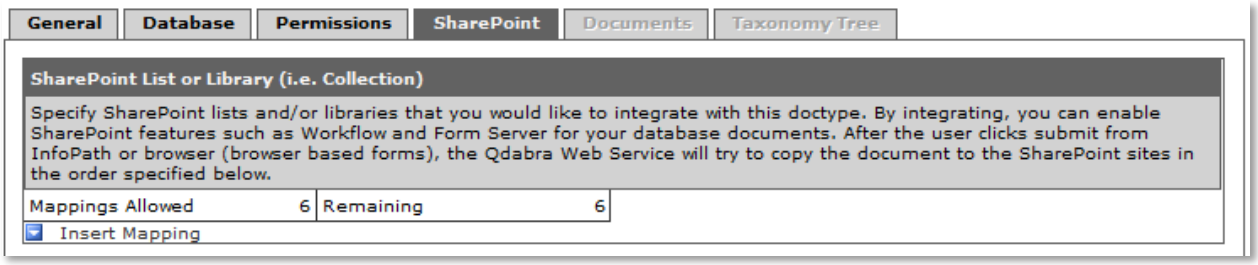
7. Click **Save**. DBXL will display a confirmation message through a dialog box. Click **OK** to close it.

CREATE A CONTENT TYPE MAPPING

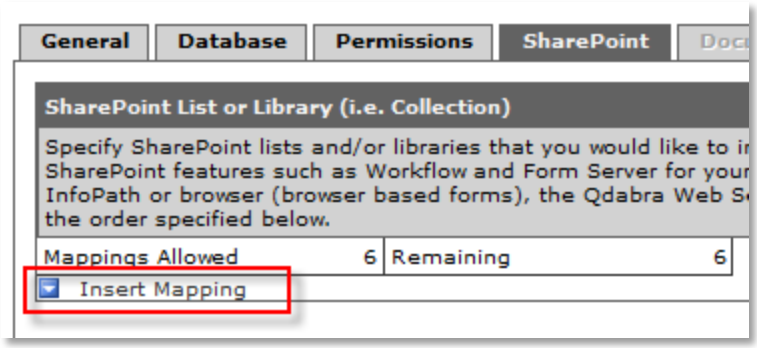
1. Click on the *SharePoint* tab.



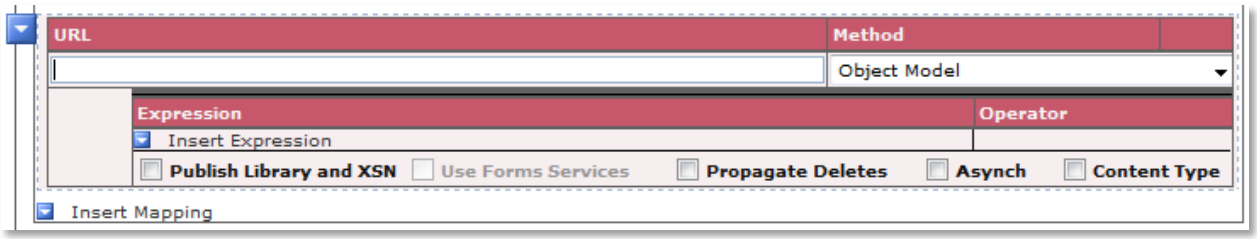
2. Here you will be able to specify the SharePoint library that you would like to integrate with your doctype.



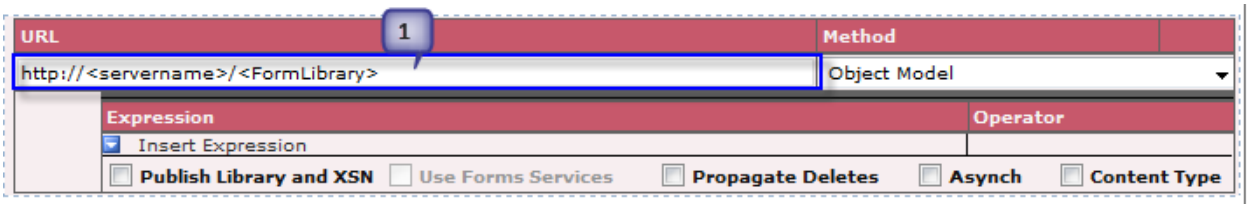
3. Click on **Insert Mapping**.



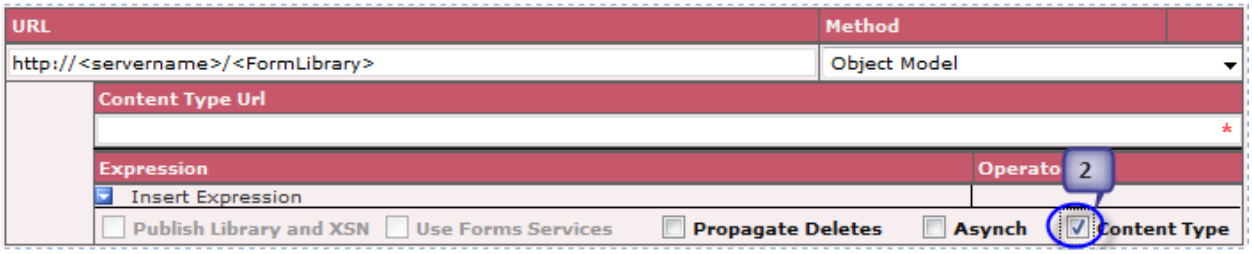
4. A section similar to the image below will display.



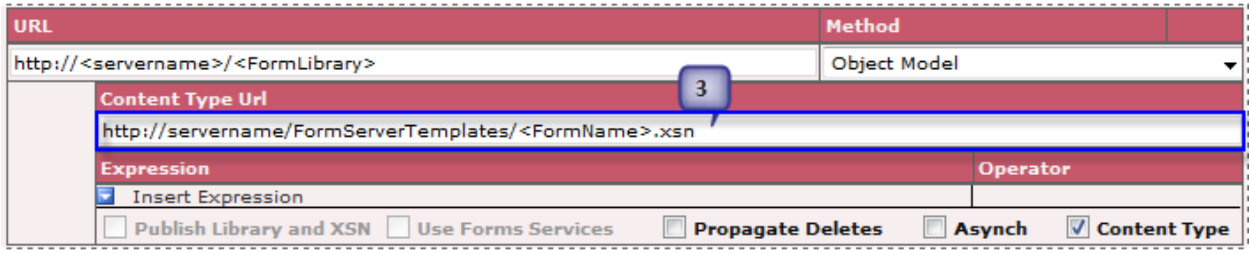
5. First, you need to enter the URL of the SharePoint library. This is the library you'll be using to submit your forms.



6. Second, check the **Content Type** check box. This will insert the *Content Type Url* field.



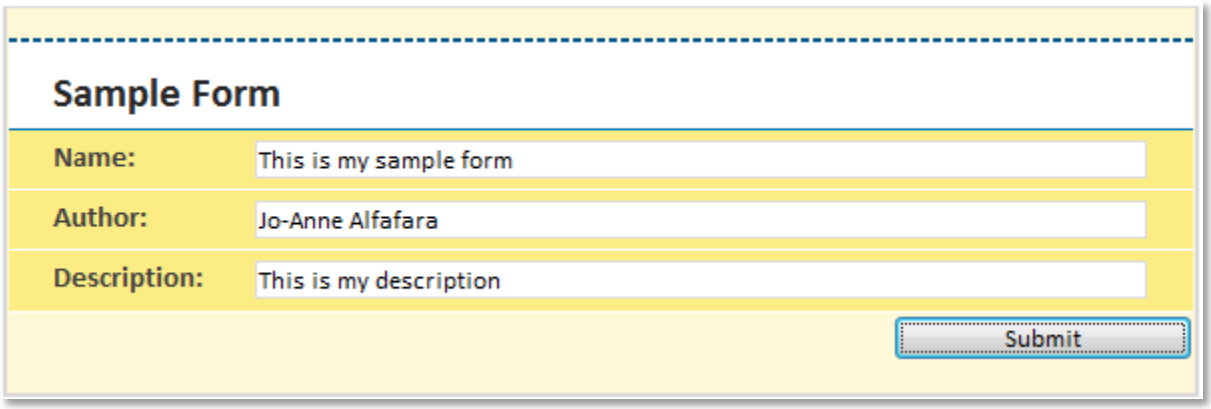
7. Third, enter the URL to the admininstrator-approved form template. This is the same URL you've used to attach the XSN in the *General* tab. To help you recall, see the format below:
   http://servername/FormServerTemplates/<FormName>.xsn



8. Once you've added all the required URLs, click on **Save** once again.

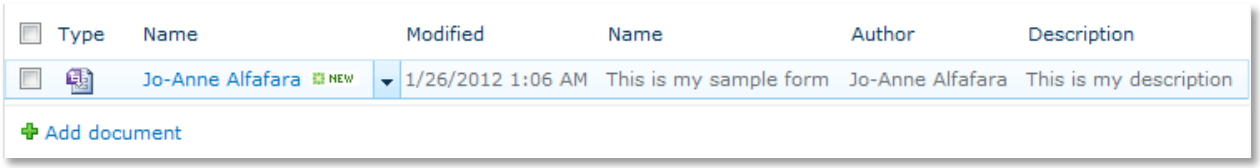
TEST THE SOLUTION

1. Launch the SharePoint Library in your browser.
2. Click on Add document link. If you're running SharePoint 2010, it will default to open in the browser.
3. Fill out the form and click **Submit**.

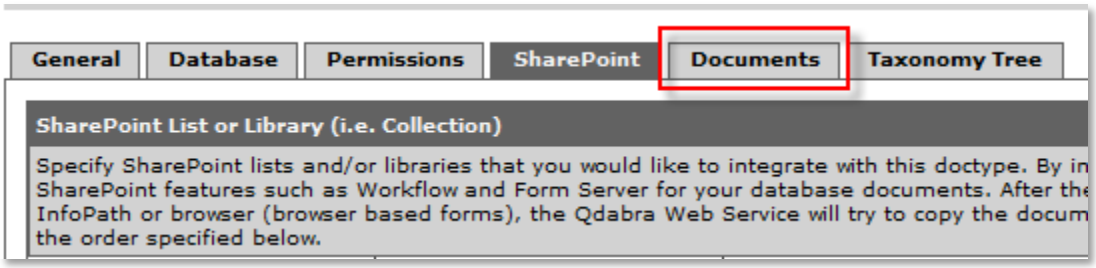


4. Wait for the data to be sent to the server and then close the form.
5. Refresh the SharePoint Library page. You'll see the document you just submitted.
6. If you the fields you promoted are not displayed, you can manually add it by going to the *Library* tab → **Library Settings**. Under the *Views* section, click **All Documents**. Check the column names you want to display.

7. Now the SharePoint Library page will display the form with the columns you added.

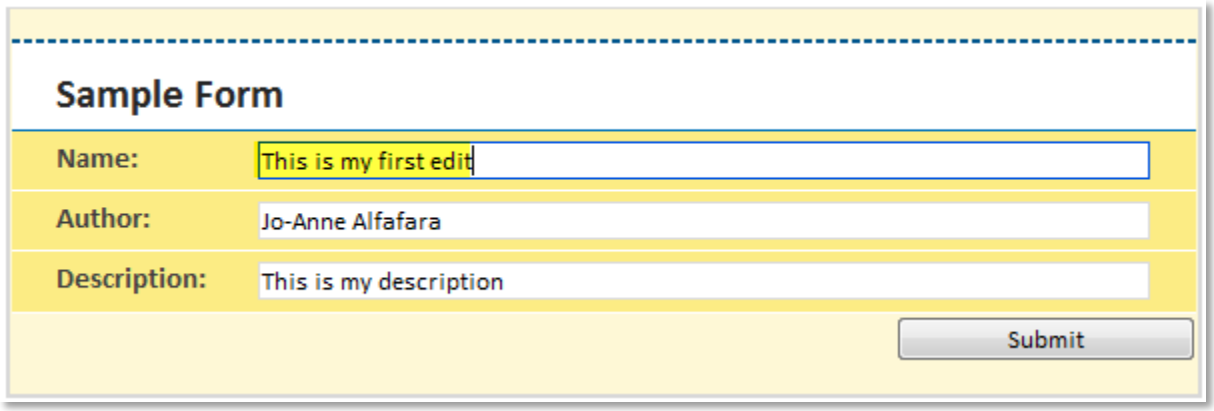


8. If your DAT is still open, click on the *Documents* tab.

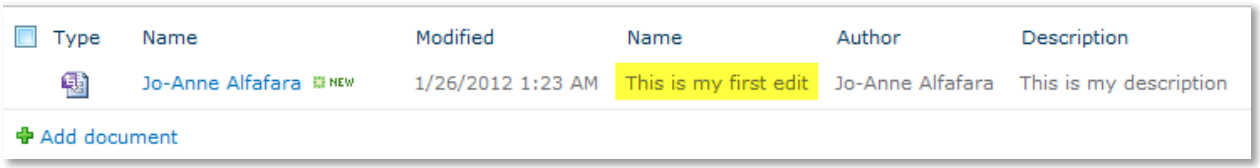


9. This view will display all the documents you submitted in DBXL and in SharePoint. The screenshot below shows the form that I submitted via SharePoint.

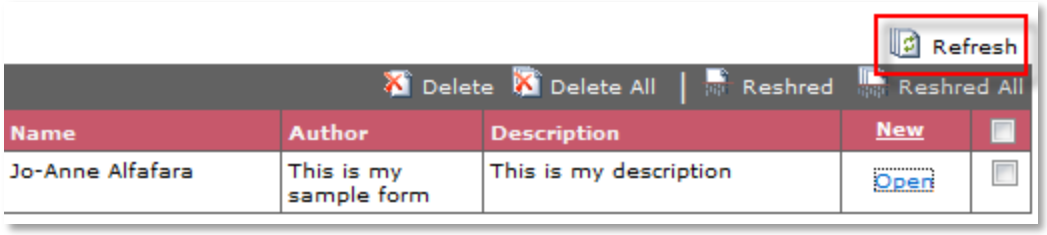
10. Go back to your SharePoint Library.
11. Click on the form you submitted to open in the browser.
12. Make some changes to the values you entered. I have highlighted the change I made below.



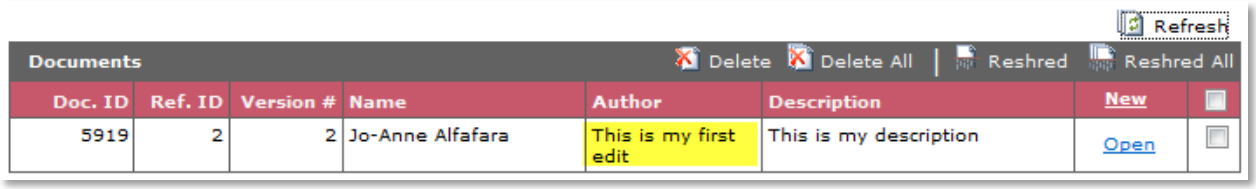
13. Click **Submit** and close the form.
14. Back to the form library page, you should see your changes like I have below.



15. Go back to DAT and click the Refresh button in the *Documents* tab.



16. The change you made in SharePoint will also reflect in DBXL.



Play around by submitting or editing in DBXL and verifying your changes in SharePoint. You can also try deleting a form in SharePoint, but take note that it will not be deleted in DBXL. DBXL serves as a backup for you. Whenever you need that form again, you can use the "reshred" function in DAT and the form will be restored in SharePoint. Once the form is deleted in DBXL, it will also be deleted in SharePoint.

SUPPORT

If you have questions about the information in this document, please contact us for assistance. Licensed customers contact us via **Support@Qdabra.com**. Alternatively, please use the InfoPathDev.com Qdabra Product support forums to request help.