

INTEGRATE A FORM WITH DBXL

The steps in this training module assume that DBXL has already been installed.

PRE-REQUISITE: PERMISSIONS

These steps will be demonstrated by the presenter.

To successfully complete this training lab, you must be a DBXL Administrator. The following steps will show you how to check whether you are an administrator, and add yourself if you are not.

1. Log on to the machine where DBXL is installed.
2. In the Qdabrawebservice folder, find the web.config file.

The QdabraWebService folder is located, usually, in your SharePoint-80 site. For example:

C:\inetpub\wwwroot\wss\VirtualDirectories\80\QdabraWebService

3. Open the web.config file in a text editor, such as Notepad.
4. Look for the following: **AdminGroupAlias** and **DbxlAdminAlias**. You'll find a section that looks like this:

```
<add key="BrowserGroupAlias" value="NT AUTHORITY\Authenticated Users" />
<add key="ReaderGroupAlias" value="" />
<add key="WriterGroupAlias" value="" />
<add key="AdminGroupAlias" value="<machine name>\DbxlAdmins" />
<add key="DbxlAdminAlias" value="<machine name>\DbxlAdmins" />
```

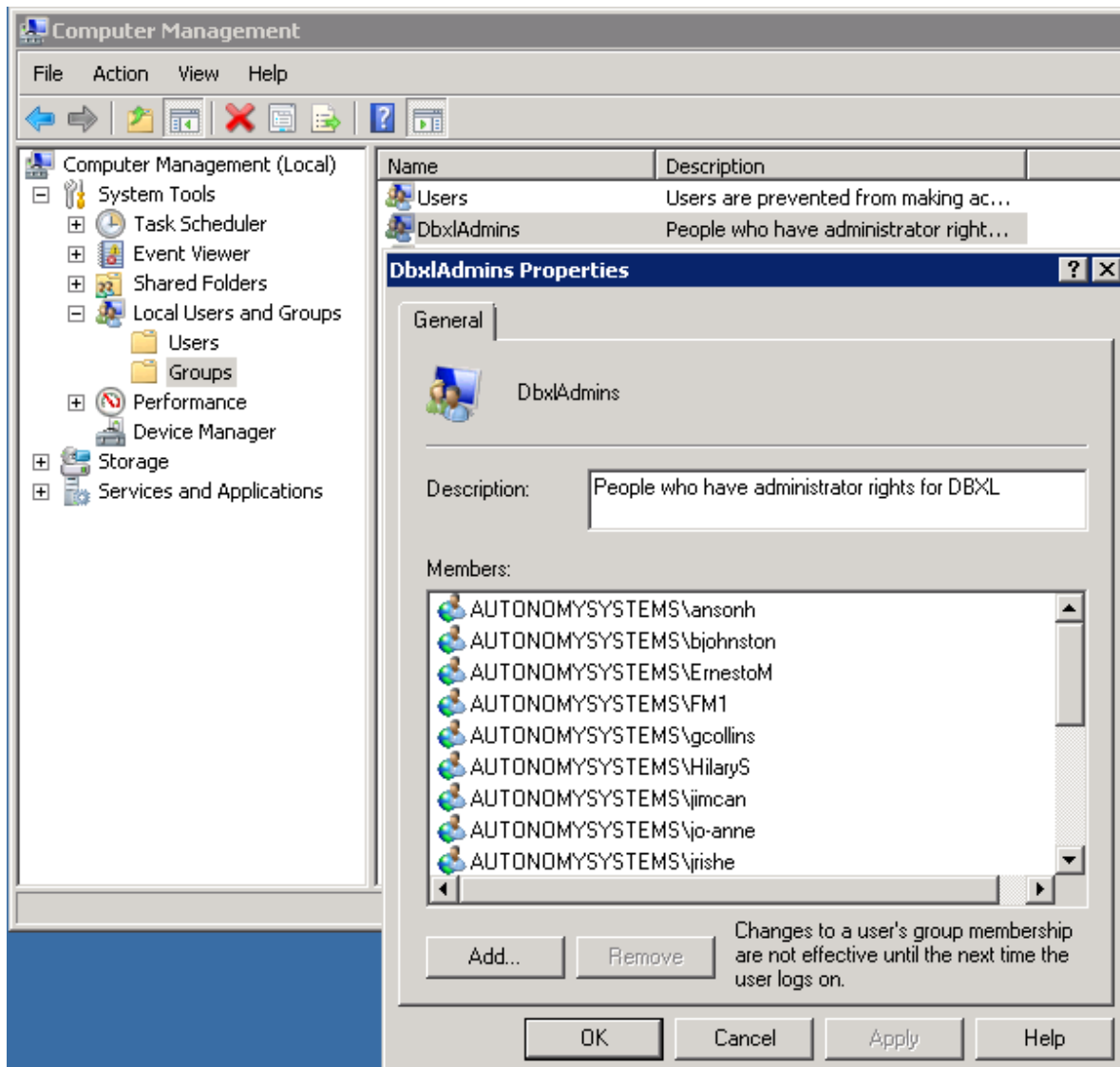
5. Each of these keys will be assigned a value, that is, a group.

Notice that during installation DBXL creates a group called DBXLAdmins on the machine. This group, by default, is assigned to both keys: **AdminGroupAlias** and **DbxlAdminAlias**.

To add a DBXL Administrator all you need to do is add users to the DbxlAdmins group.

6. Open **Computer Management**.
7. Under **System Tools > Local Users and Groups**, locate the DbxlAdmins group. Right click to see its **Properties**.
8. Add yourself to this group.

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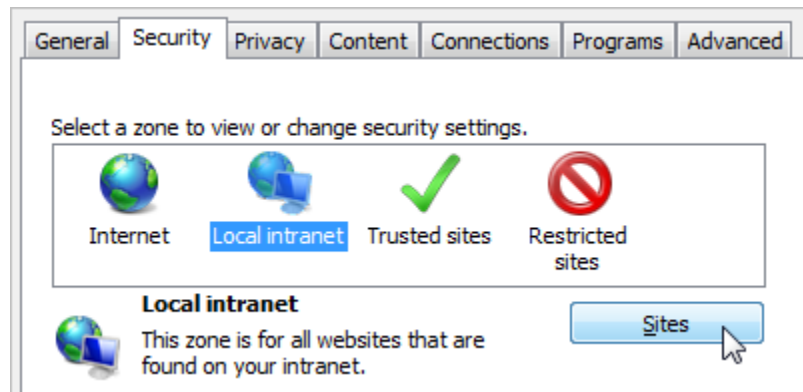
9. Click OK and log out of the server where DBXL is installed.

PRE-REQUISITE: LOCAL INTRANET

Before we begin, we will add the server in our local intranet zone to avoid numerous credential prompts as well as permission issues.

10. In Internet Explorer, go to *Internet Options*, switch to the **Security** tab, select **Local intranet** and then click **Sites**.

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11. In the *Local intranet* window, click **Advanced**.
12. Enter the site and then click **Add**.
13. It should now be listed in the local intranet websites – click **Close**, and then click **OK** twice to close all the dialogs.

MODIFY YOUR FORM SO THAT IT SUBMITS TO DBXL

The InfoPath form template needs to be configured to submit to the DBXL web service.

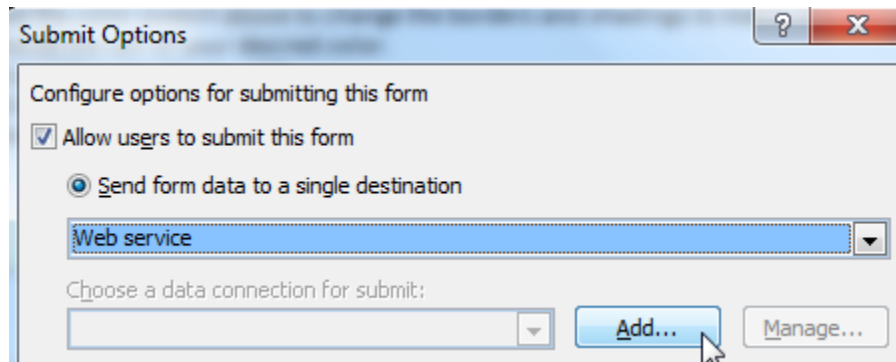
14. Open your InfoPath form template (XSN) in design mode.

You could follow these steps for any InfoPath form template. However, for the purposes of this training module, we are using a sample form created by Microsoft and included in InfoPath 2007.

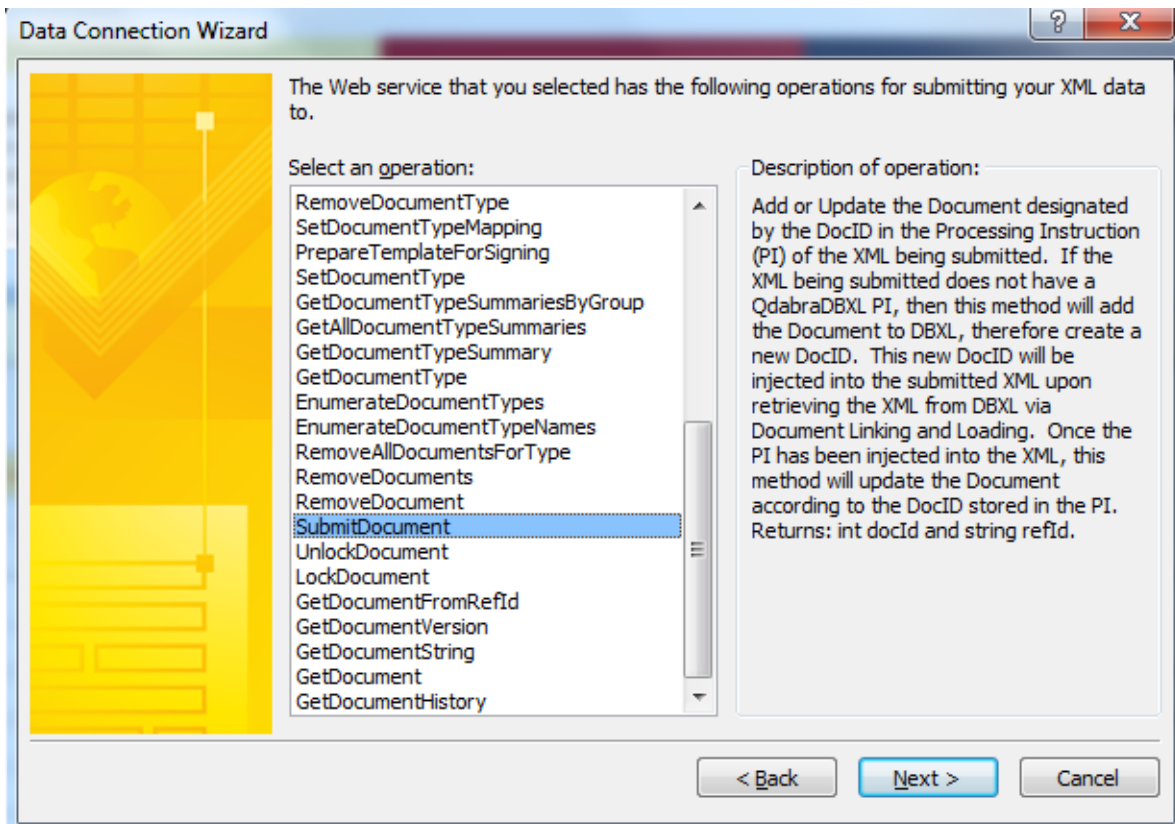


15. Switch to the **Data** tab in the InfoPath 2010 ribbon and select **Data Connections**.
16. You'll see a data connection called **Main Submit**. Since you want the form to submit to DBXL (instead of using this data connection), let's **Remove** this data connection. Then click **Close**.
17. Now click on **Submit Options**.
18. Click the checkbox for "Allow users to submit this form".
19. In the dropdown under "Send form data to a single destination", select **Web Service**.

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20. Click **Add**. This will load the Data Connection Wizard.
21. In the web service field, enter
`http://<yourservername>/qdabrawebservice/DbxlDocumentService.asmx` and click **Next**.
22. Select **SubmitDocument** and click **Next**.



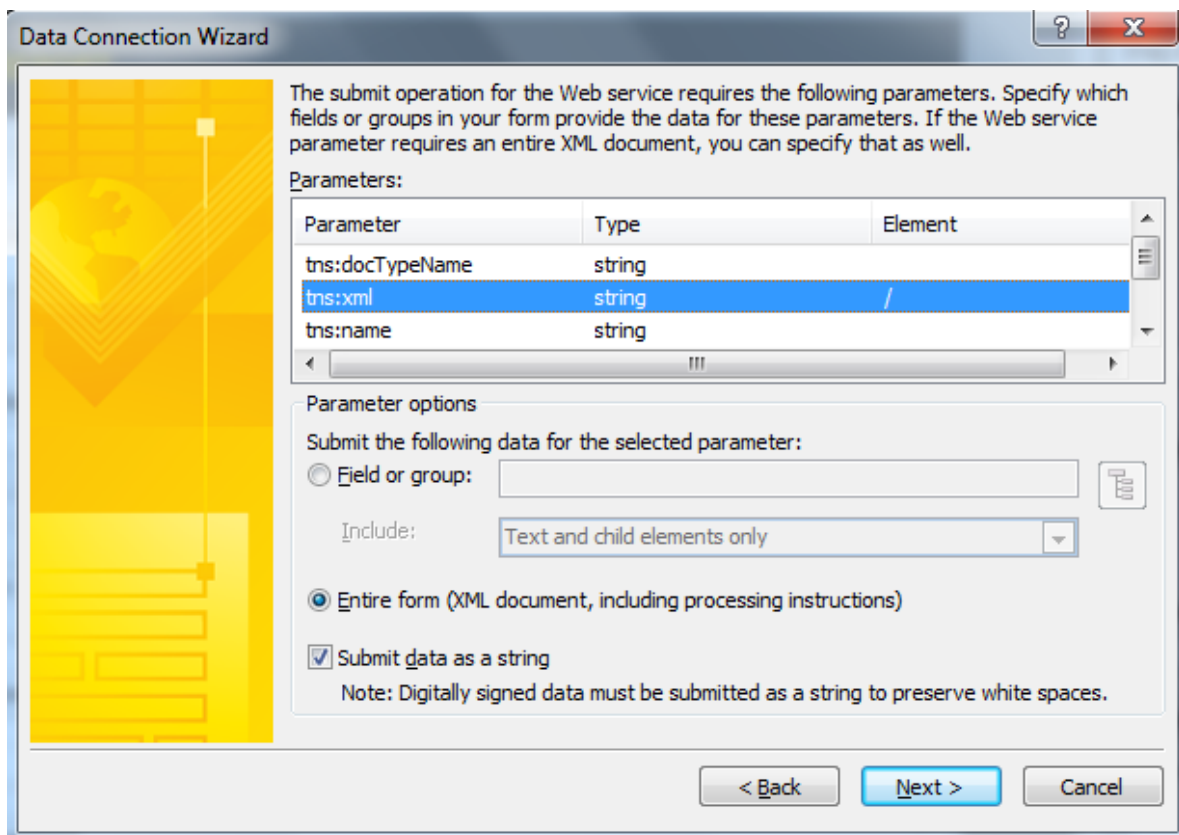
Next, you'll configure the parameters used to submit to DBXL.

23. Ignore the first parameter, called **tns:docTypeName**. It will default to the DocType of the form.

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There are some scenarios where this value will need to be assigned a value. We will illustrate one such scenario later in the training, but for now it can be left blank.

24. Select the second parameter, named **tns:xml**.
25. Under **Parameter options** select the **Entire form (XML document, including processing instructions)** radio button.
26. Check the **Submit data as a string** checkbox.



The submit operation for the Web service requires the following parameters. Specify which fields or groups in your form provide the data for these parameters. If the Web service parameter requires an entire XML document, you can specify that as well.

Parameters:

Parameter	Type	Element
tns:docTypeName	string	
tns:xml	string	/
tns:name	string	

Parameter options

Submit the following data for the selected parameter:

☐ Field or group:

Include:

☒ Entire form (XML document, including processing instructions)

☒ Submit data as a string

Note: Digitally signed data must be submitted as a string to preserve white spaces.

< Back Next > Cancel

That's the only required parameter. The next three are optional parameters.

27. Select the **tns:name** parameter.

This parameter, along with the **Author** and **Description**, are called "DBXL tokens". These are displayed in the document list in the **Documents** tab in DAT.

28. Select the radio button **Field or Group** in the **Parameter options** section.
29. Click the Modify button next to the **Field or Group** text box. The **Select a Field or Group** dialog will appear.

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30. Select the node **/my:expenseReport/my:expenseCode**, click **OK** and check the **Submit data as a string** checkbox.
31. Select the **tns:author** parameter.
32. Select the radio button **Field or Group** in the **Parameter options** section.
33. Click the Modify button next to the **Field or Group** text box. The **Select a Field or Group** dialog will appear.
34. Select the my:name field under my:employee, click **OK** and check the **Submit data as a string** checkbox.
35. Select the **tns:description** parameter.
36. Select the radio button **Field or Group** in the **Parameter options** section.
37. Click the Modify button next to the **Field or Group** text box. The **Select a Field or Group** dialog will appear.

Parameters:		
Parameter	Type	Element
tns:xml	string	/
tns:name	string	/my:expenseReport/my:expenseCode
tns:author	string	/my:expenseReport/my:employee/my:name
tns:description	string	/my:expenseReport/my:purpose

38. Click **Next**. Click **Finish**.
39. Back in the **Submit Options** dialog, enter **Submit** into the **Label** field.
40. Click **Advanced**. In the **After Submit** dropdown, select *Close the form*.
41. There are options to show users a success or failure message on submit. Check both checkboxes and modify the failure and success messages if so desired.

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Submit Options

Configure options for submitting this form

☒ Allow users to submit this form

☒ Send form data to a single destination

Web service

Choose a data connection for submit:

Main submit

Add... Manage...

☐ Perform custom action using Rules

☒ Show the Submit button in both the Ribbon and the Info tab in the InfoPath Filler.

Label: Submit

☒ Show this message if the form submission fails:

The form cannot be submitted because of an error.

☒ Show this message if the form is submitted successfully:

The form was submitted successfully.

After submit: Close the form

Advanced << OK Cancel

42. Click **OK**.
43. Save the updated form by selecting **File > Save**. When saving, save the form as an InfoPath Web Browser Form instead of InfoPath 2007. Then close the InfoPath 2010 designer.

Save as type: InfoPath Web Browser Form Template

InfoPath Web Browser Form Template

InfoPath Filler Form Template

InfoPath 2007 Web Browser Form Template

InfoPath 2007 Filler Form Template

InfoPath 2003 Form Template

Your form is now configured to submit to the DBXL document service.

CREATE A DOCUMENT TYPE CONFIGURATION

In this section, we will use the DBXL Administration Tool (DAT).

44. Open Internet Explorer and access the URL
<http://<machinename>/QdabraWebService/default.htm>.



45. Once the page opens, click the **DBXL Administration Tool** hyperlink.

InfoPath should open a form similar to the one below:

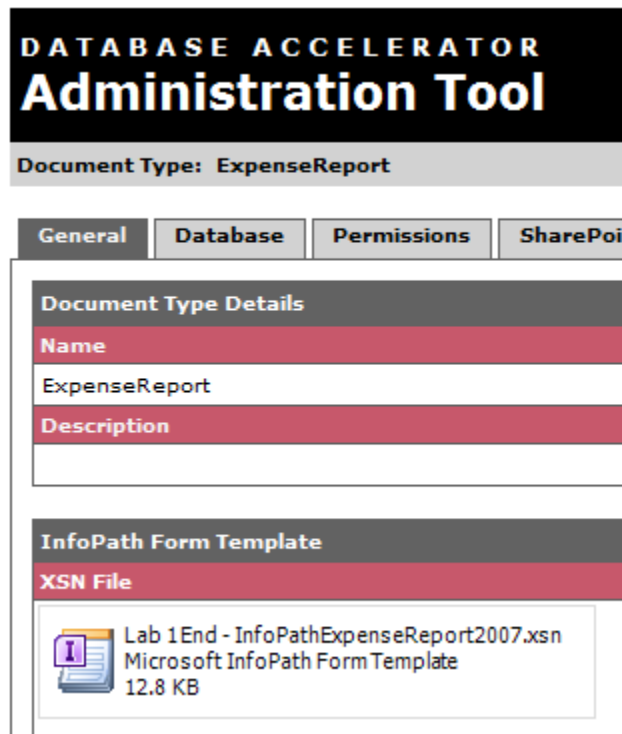


Now you can create a new configuration in DAT.

46. In DAT, click on **New Configuration**.
47. Type **ExpenseReport** into the **Name** field.

If you are executing this training on the same server as other users, you will want to provide a name unique from the other users, for example, **ExpenseReport_JohnSmith**.

48. Under **InfoPath Form Template**, click on **Click here to attach a file**.
49. Select the XSN saved in the previous section and click **Insert**.



50. Click **Save**. DBXL will confirm the operation through a dialog box. Click **OK** to close it.

TEST SUBMIT

51. Under the InfoPath attachment, you'll now see a link labeled **Open**. Click it. The form will open and you will be able to fill it out.
52. Fill out the form.
53. When done, click the **Submit** button in the Ribbon. The form will automatically close.
54. Back in the DBXL Administration Tool, click on the **Documents** tab.

DATABASE ACCELERATOR
Administration Tool



Document Type: ExpenseReport

 Save
  Save As...
  Catalog
 

General
Database
Permissions
SharePoint
Documents
Taxonomy Tree

Export Documents

Import Documents

Query Documents

To limit the number of documents shown, enter a starting Doc. ID and the number of documents to show, and then click query. You can then jump forward or backward by the number of shown documents, or click Query All to show all documents. To search for a Document with a specific Ref. ID, type the ID into the field, and then click Query.

Starting Doc. ID: 6461

Ref. ID: 1

Range: 20

 Previous
  Next
  Query
  Query All

 Refresh

Documents

 Delete
  Delete All
  Reshred
  Reshred All

Doc. ID	Ref. ID	Version #	Name	Author	Description	New	
6461	1	1	2012-03-18	Ernesto Machado	This is a test document.	Open	

In the table, you will see your newly submitted document! Because we added values for the Name, Author and Description tokens, we can quickly identify our documents in this table.