

# MAP YOUR FORMS TO SHAREPOINT

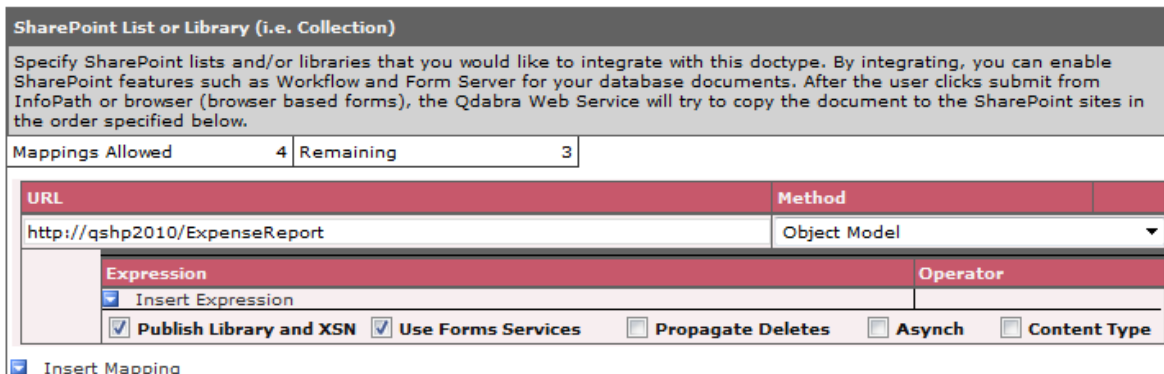
So far you have integrated InfoPath with DBXL and with SQL. The next logical step is SharePoint!

## ADD A SHAREPOINT MAPPING

1. For the Expense Report document type, switch to the **SharePoint** tab.
2. Click **Insert Mapping**.
3. In the **URL** field, enter the URL to a form library that does not exist.

Creating a SharePoint mapping requires that DBXL be installed on the same server as SharePoint. Therefore, your SharePoint form library will exist on the same server where DBXL is installed.

4. For **Method**, select **Object Model**.
5. Check the checkboxes for **Publish Library and XSN** and **Use Forms Services**.
6. Click **Save** and then click **OK** in the confirmation dialog.



**SharePoint List or Library (i.e. Collection)**

Specify SharePoint lists and/or libraries that you would like to integrate with this doctype. By integrating, you can enable SharePoint features such as Workflow and Form Server for your database documents. After the user clicks submit from InfoPath or browser (browser based forms), the Qdabra Web Service will try to copy the document to the SharePoint sites in the order specified below.

Mappings Allowed	4	Remaining	3
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URL	Method
http://qshp2010/ExpenseReport	Object Model

Expression	Operator
Insert Expression	

Publish Library and XSN
  Use Forms Services
  Propagate Deletes
  Asynch
  Content Type

7. Use Internet Explorer to navigate to the form library URL.
8. Click **Add Document**.
9. Fill out the form and submit.

The form library in Internet Explorer will refresh and you'll see the new document. Congratulations! You have created a SharePoint mapping.

Type	Name	Modified	Modified By	Checked Out To	DBXL ID	DBXL Version	Author	Description	Title
	2012-03-18 	3/18/2012 7:20 PM	AUTONOMYSYSTEMS\ErnestoM		6467	1	Michael Jones	This is a test	2012-03-18

[Add document](#)

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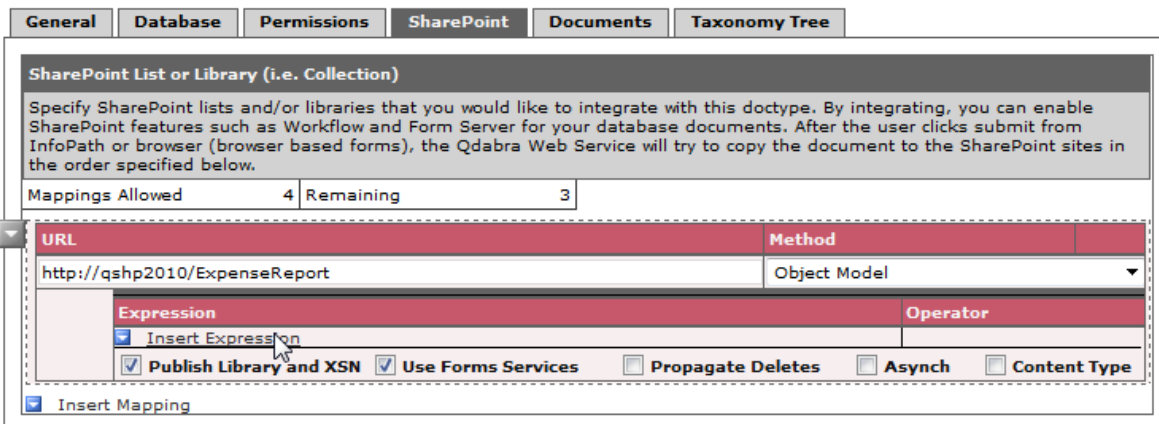
What about the existing documents, though? Simple – just click **Reshred All** in the **Documents** tab.

Type	Name	Modified	Modified By	Checked Out To	DBXL ID	DBXL Version
	2012-03-18 (6461) <small>NEW</small>	3/18/2012 7:21 PM	AUTONOMYSYSTEMS\ErnestoM		6461	1
	2012-03-18 (6462) <small>NEW</small>	3/18/2012 7:21 PM	AUTONOMYSYSTEMS\ErnestoM		6462	1
	2012-03-18 (6463) <small>NEW</small>	3/18/2012 7:21 PM	AUTONOMYSYSTEMS\ErnestoM		6463	1
	2012-03-18 (6464) <small>NEW</small>	3/18/2012 7:21 PM	AUTONOMYSYSTEMS\ErnestoM		6464	1
	2012-03-18 (6465) <small>NEW</small>	3/18/2012 7:21 PM	AUTONOMYSYSTEMS\ErnestoM		6465	3

## CONDITIONAL SHAREPOINT MAPPING

Now you want to map forms only when a certain condition is satisfied.

- Back in the DBXL Administration Tool, in the SharePoint tab, click **Insert Expression**.



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Mappings Allowed: 4 Remaining: 3

URL	Method
http://qshp2010/ExpenseReport	Object Model

Expression	Operator
Insert Expression	

Publish Library and XSN
  Use Forms Services
  Propagate Deletes
  Asynch
  Content Type

Insert Mapping

- In the Expression field, enter

**/my:expenseReport/my:expenseCode !=""**

- Click **Save**, and then **OK** in the confirmation dialog.
- Back in Internet Explorer, click **Add Document**.

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14. Fill out the form and submit. Make sure to leave the expenseCode blank.

When the form submits and the form library refreshes, you'll notice that the form you just submitted does not show up! This is because it did not satisfy the condition.

15. In DAT, switch to the Documents tab, to verify that the form you just submitted is listed.
16. Back in Internet Explorer, click **Add Document**.
17. Fill out the form and submit. Make sure to fill out the expenseCode field.

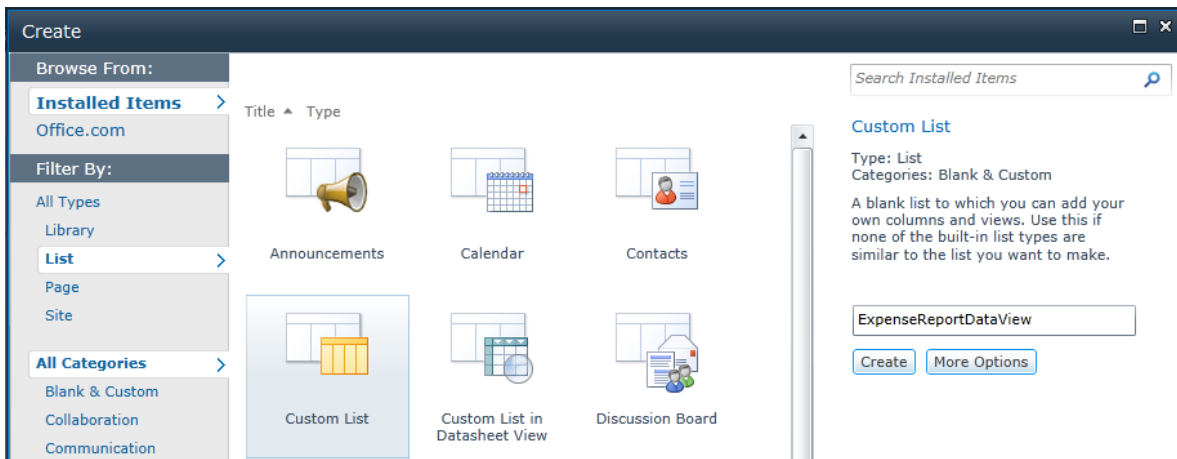
Refresh the form library and the **Documents** tab in DAT to verify that the forms with an expenseCode are all mapped to SharePoint correctly.

### CREATE A SHAREPOINT DATA VIEW THAT ENFORCES DBXL PERMISSIONS

SharePoint Designer allows you to receive data from DBXL's web methods, and one method in DBXL is particularly interesting because it allows you to create a SharePoint Data View. The DBXLDocumentService web service contains GetListItems, which retrieves promoted properties in the form and displays them as columns in SharePoint. GetListItems has an added bonus: it will respect DBXL permissions.

Perhaps you don't want a SharePoint mapping, or perhaps the format for the Form Library is not the desired UI. The SharePoint data view will allow you to design the page as you desire.

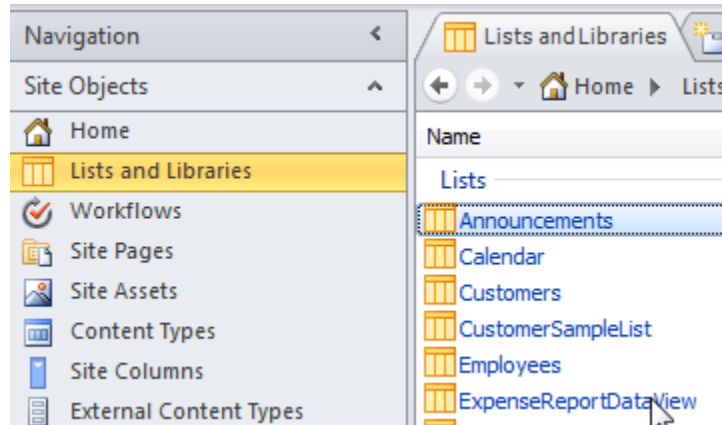
18. Navigate to the site where you wish to add this data view. Click on **All Site Content** and then click on **Create**.
19. Select **Custom List**, enter a name for the list and click **Create**.



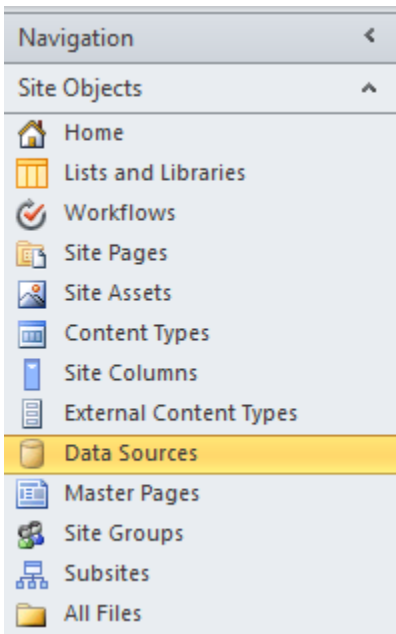
20. Launch SharePoint Designer 2010.
21. Go to **File > Open Site**. Enter the URL to your site and click **Open**. The site will load and might take a few seconds depending on the size of your site.

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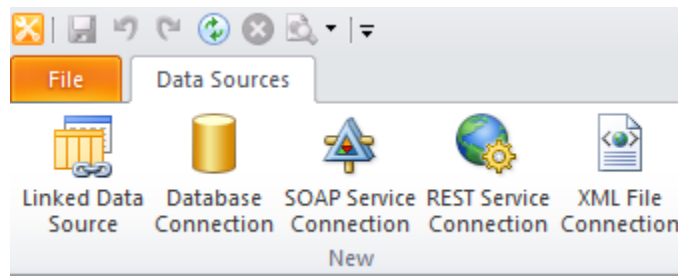
22. In the **Navigation** frame, select **List and Libraries**. This will load the list of available lists and libraries.



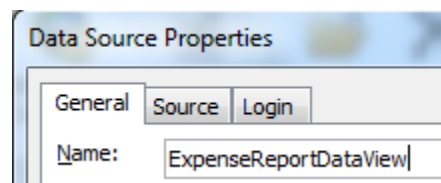
23. Click on the list you previously created to open it.
24. Under **Views**, click on **All Items** to open this default view in the editor.
25. In the **Navigation** pane, select **Data Sources**.
26. Select **Data Sources** in the Ribbon and then select **SOAP Service Connection**.



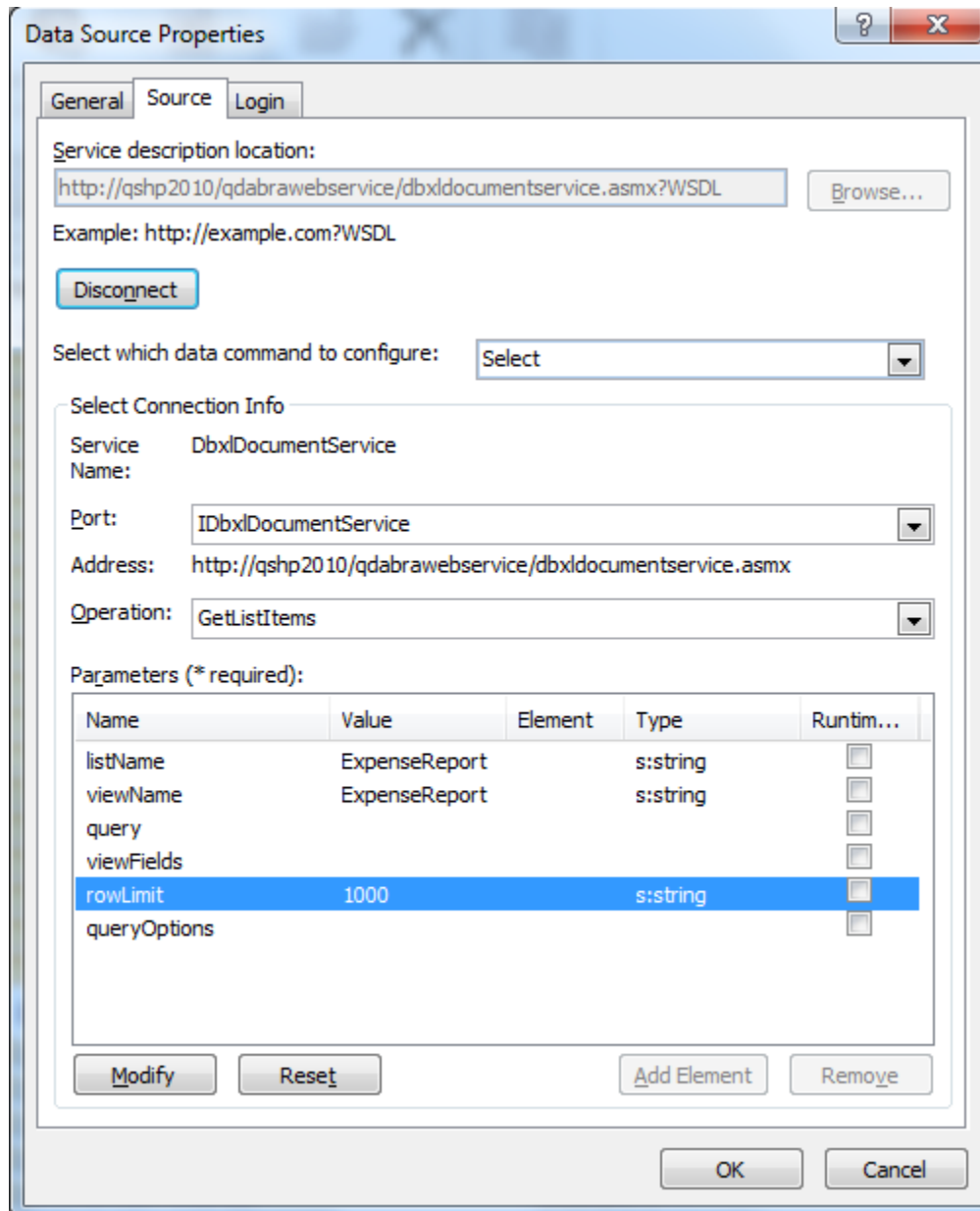
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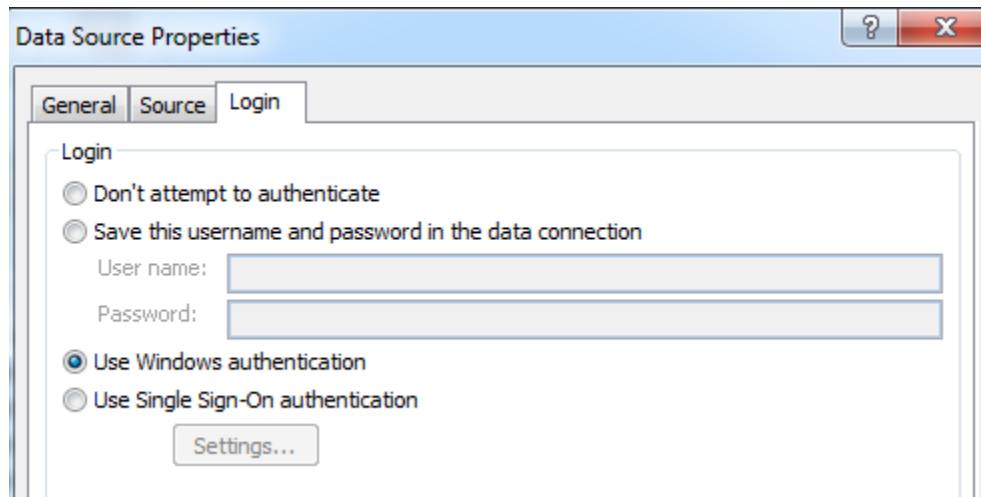
27. In the **General** tab, enter a name for your data source.



28. In the **Source** tab, enter the web service URL:  
***http://<servername>/qdabrawebservice/dbxldocumentservice.asmx***
29. Click on **Connect Now**.
30. From the **Operation** dropdown select **GetListItems**.
31. Double click on the **listName** and **viewName** parameters, and enter the name of the DBXL Document Type you wish to query, in this case ExpenseReport. Click **OK**.
32. **GetListItems** limits the results returned in your SharePoint list to the first 100 documents. In order to increase this, set the rowLimit to more than 100 rows.



33. Under the **Login** tab, select **Windows Authentication**.



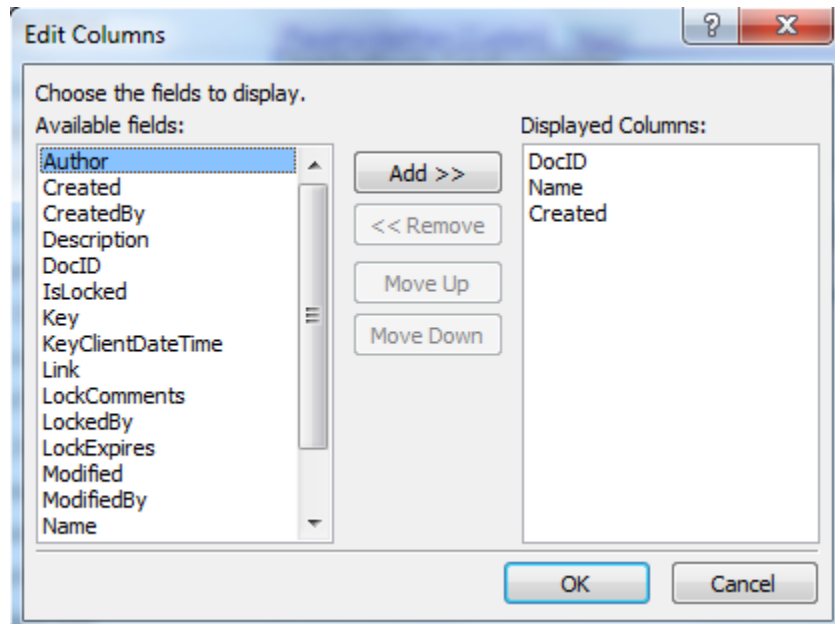
34. Click **OK**. This creates the Data Source.
35. Return to the **AllItems.aspx** edit view. You'll see navigation tabs at the top.



SharePoint adds some generic layout tables and controls to this view, which you can remove or modify as desired.

36. Place the cursor on the location where you wish to enter the data view.
37. From the ribbon option **Insert**, select **Data View** and then select the data source we created above. If it doesn't display among the options, you might need to select **More Data Sources**. If the current data source does not display in the right hand taskpane, click on **Refresh data source** to query it again.
38. Modify the available columns by going to **Options > Add/Remove columns** in the ribbon. Add/remove columns as desired. You may also choose to reorder the columns using the **Move Up** and **Move Down** buttons.

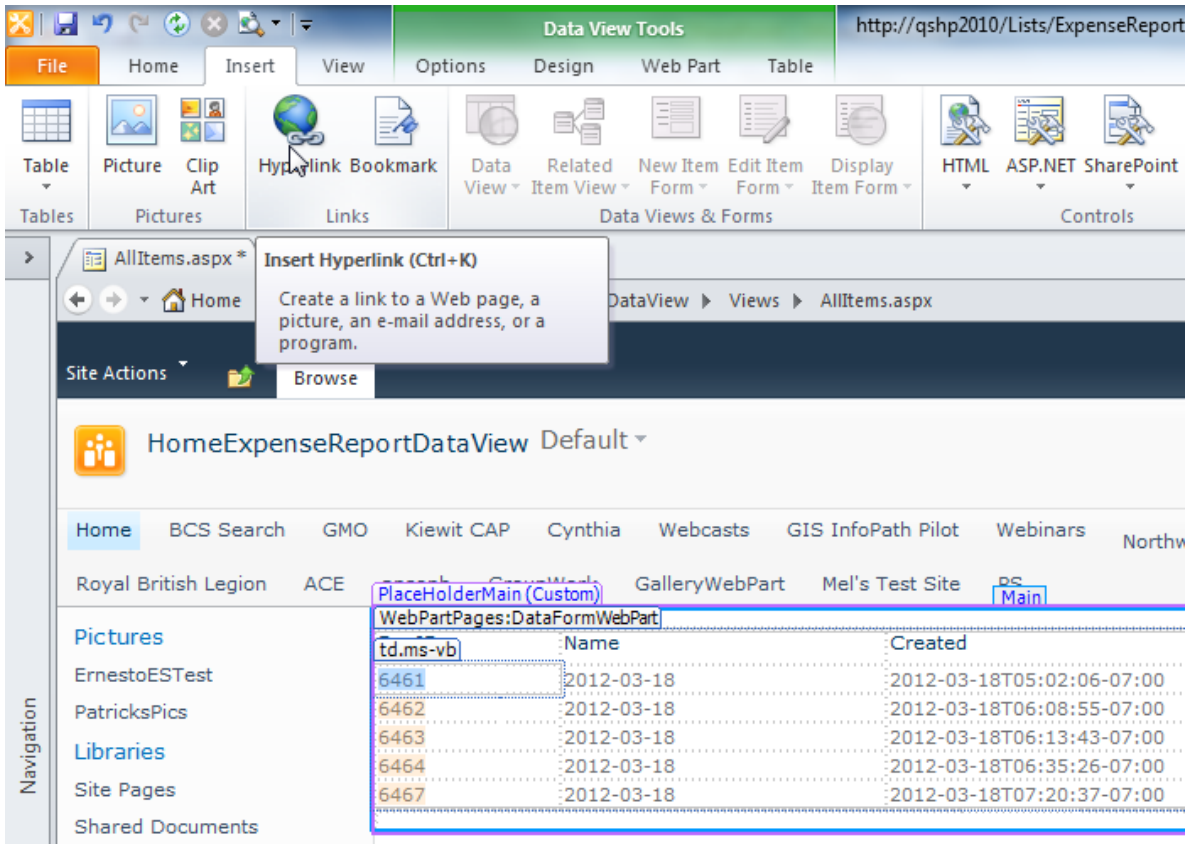
**Note:** You can only show columns for fields that have been promoted. If you don't see the field you want to display as a column, please verify that it has been added as a promoted property to the form and the form republished.



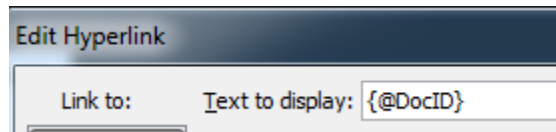
39. Select the column item you wish to use as a hyperlink, and then select **Insert > Hyperlink** from the ribbon. In our case we will add the link to the DocID column.




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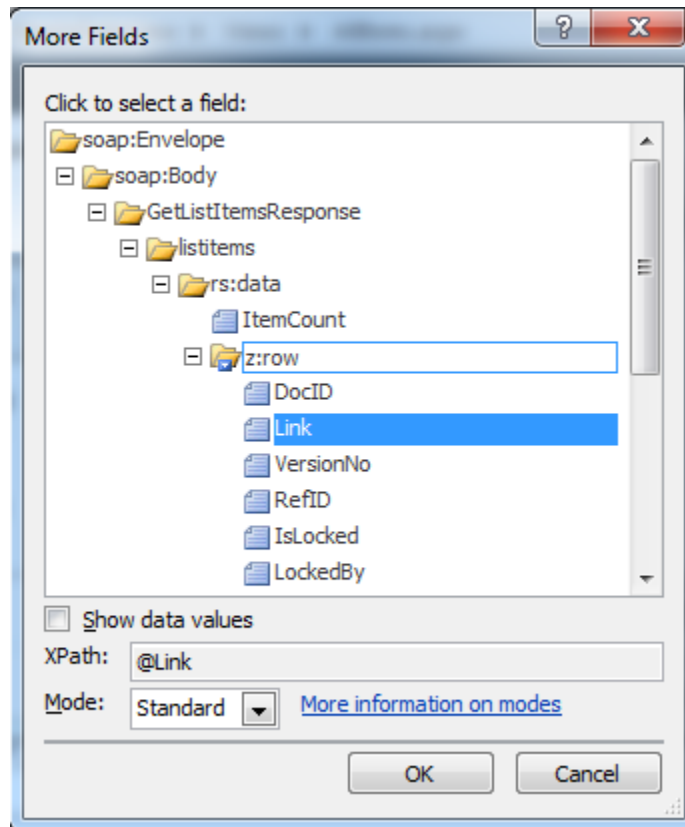
40. Notice that the **Edit Hyperlink** window, shown below, has the Text to display set to the DocID.



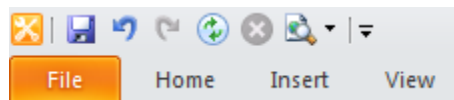
41. Make sure that the **Address** box is empty (SharePoint Designer may try to load a value into that box, but we don't need it.)

42. Next to the **Address** box, click the **fx** button (  ).

43. Select the **Link** field and click **OK**.



44. Click **OK**.
45. Click the **Save** icon to save the changes to your SharePoint List.



46. Return to Internet Explorer and navigate to the page you have been designing. You might need to refresh it to load the design changes. You'll see that it contains a list of the available forms.

DocID	Name	Created
6034	ErnestoM - 2012-02-02T18:03:48	2012-02-02T01:04:13-08:00
6035	ErnestoM - 2012-02-02T18:04:26	2012-02-02T01:04:28-08:00

You have now created a simple, SharePoint data view and have learned the basics of SharePoint Designer. The links will open the forms that are stored in DBXL, and the DBXLDocumentService will respect DBXL permissions.

**MODIFY THE DATA VIEW LINK FOR BROWSER-COMPATIBILITY**

However, the steps above use the DBXL link. What if you want the form to open in the browser?

47. Return to the Form Library created in the previous section, and click on any of the existing documents. Make a note of the URL.

Let's understand that URL:

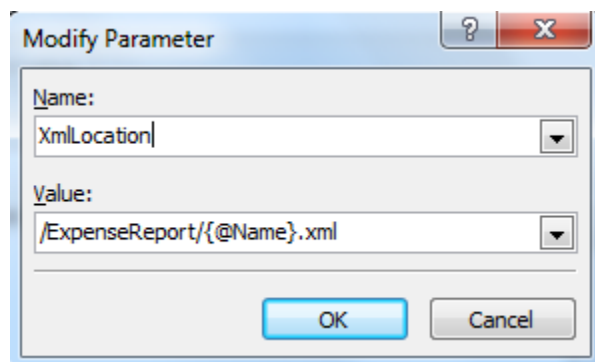
http://<servername>/\_layouts/FormServer.aspx?XmlLocation=/ExpenseReport/2012-03-18%20(6462).xml&ClientInstalled=true&Source=<encoded URL>&DefaultItemOpen=1

It is made up of the following essential portions:

- http://<servername>/\_layouts/FormServer.aspx
- XmlLocation=/ExpenseReport/2012-03-18%20(6462).xml
- Source=<encoded URL>
- DefaultItemOpen will be replaced by a different parameter, per Microsoft's documentation.

We'll need to recreate this URL in SharePoint designer.

48. Reselect the column in the data view that contains the link.
49. Click **Insert Hyperlink** in the ribbon.
50. Clear out the contents of **Address**.
51. Click **Parameters**.
52. For **Path**, enter http://<servername>/\_layouts/FormServer.aspx
53. Click **Add**.
54. For **Name**, enter **XmlLocation**.
55. For **Value**, enter /ExpenseReport/{@Name}.xml



56. Click **Add** again.
57. For **Name**, enter **OpenIn**.

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58. For **Value** enter **Browser**.
59. Click **Add** again.
60. For **Name**, enter **Source**.
61. For **Value** enter the URL that users should see after filling out the form.
62. Click OK to dismiss all windows.
63. Click **File > Save**.
64. Refresh the data view page on your browser. Try the new link – it should open the forms in the browser!

**Bonus:** Explore the grouping and sorting options that SharePoint designer provides! Add/remove columns to understand how you can re-work the data view to your liking.