

CONFIGURE DBXL STANDALONE TO SYNCHRONIZE WITH SHAREPOINT

So far in this training we have been dealing with DBXL Server Edition, that is, the version of DBXL that is installed on a server. Users submit documents to the web service and forms are mapped to SQL and SharePoint.

This lab will cover the DBXL Standalone (or Client) version. Users will not submit documents to the DBXL web service. Instead, we will assume there is an existing SharePoint form library, we wish to report on that data, but we cannot install DBXL on the server.

PRE-REQUISITES

1. We assume that there is a SharePoint form library with existing forms filled out. For the purposes of this lab we have the following library:
<https://training.formsboard.com/DBXLTrainingApril2012/Lab10>
2. Install DBXL Client. For the purposes of this lab I have already installed the DBXL Client version on my local machine.

SET UP THE DOCUMENT TYPE IN DAT

3. Open the DBXL Admin Tool (DAT).
4. Click **New Configuration**.
5. Enter a name for the new document type.
6. Attach the form. This must be the same XSN that was used for the SharePoint form library.
7. Click **Save** and then click OK in the confirmation dialog.

CREATE A SQL TABLE

8. Create a SQL table (or tables) to store the form data. Please refer to a previous lab for detailed, step by step instructions.

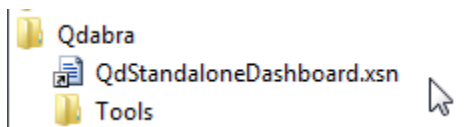
ADD A DATABASE MAPPING

Qdabra DBXL Training: Module 11

9. In DBXL, add a Database Mapping. Please refer to a previous lab for detailed, step by step instructions.

SET UP THE DASHBOARD

10. Launch the Dashboard by going to the link in the Start Menu.



11. Click on the green plus sign to add the Document Type to your Dashboard.

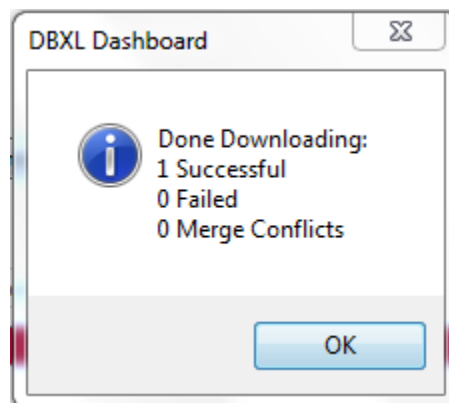


12. Under **Synchronization**, select **SharePoint** and enter the URL to the form library.

Qdabra DBXL Training: Module 11

Synchronization	
Synchronization Type	☐ DBXL ☒ SharePoint
SharePoint Library URL	https://training.formsboard.com/DBXLTrainingApril2012/Lab10
When Dashboard Opens	☐ Download

13. Click Save.
14. Click Lab10 to enter the doctype's page.
15. Click **Download**. DBXL will communicate with SharePoint and download the documents.



16. Check SQL. The data from SharePoint is now in SQL, and our XSN form and SharePoint form library did not need to be modified in any way.

Qdabra DBXL Training: Module 11

```

/***** Script for SelectTopNRows command from SSMS *****/
SELECT *
FROM [DBXLTraining].[dbo].[ExpenseReports]
/***** Script for SelectTopNRows command from SSMS *****/
SELECT *
FROM [DBXLTraining].[dbo].[ExpenseReportItems]

```

Results

Messages

	EmployeeName	EmployeeID	EmployeeEmail	ManagerName	ManagerEmail
1	Ernesto Machado	1234	ernesto.machado@qdabra.com	Patrick Halstead	patrick.halstead@c

	ItemDate	ItemDescription	Amount	Category	ExpenseReportID	ItemID
1	2012-04-13	meal	30	Meals	203	1
2	2012-04-05	hotel	90	Lodging	203	2

The dashboard has many more options, not covered in this lab. For example:

- You can set this up to perform an automatic download:

Scheduled Download	
Frequency	Manual (User Action Required)
	Hourly Daily Weekly
SharePoint Download Meta	
Name XPath	Manual (User Action Required)

- You can also specify a download filter to only download some forms:

Download Filter	
Inclusive Filter XPath	

Please contact us for additional assistance with this scenario.

BONUS

In the scenario above we discussed one way in which DBXL can interact with an existing SharePoint form library and map the data to SQL, but without making any changes to the form library.

What if you want to make the full switch to DBXL? These are the general steps:

1. Edit the form template to add a DBXL submit.
2. Create a DBXL document type.
3. Add a SharePoint mapping to a new form library. (That way we keep the original library as a backup in case we need to revert.)
4. Use Explorer view to copy the xml files from the existing form library to a local folder.
5. Import the xmls into your document type using the Import web service.
 - a. Either via Internet Explorer on the server where DBXL was installed:
<https://training.formsboard.com/QdabraWebService/DbxlImportExport.aspx?op=ImportDocuments>
 - b. Or via the DBXL Admin Tool:

DATABASE ACCELERATOR Administration Tool		QDABRA SOFTWARE	
Document Type: ExpenseReport_ernestom		 Save  Save As...  Catalog 	
General	Database	Permissions	SharePoint
Documents		Taxonomy Tree	
Export Documents Import Documents To easily test your mapping or for any other reason you may submit a document to DBXL directly from a saved location. To do this, you must specify a folder path that is available to the DBXL web service either locally (i.e. C:\MyNewDocuments) or over the network (i.e. \\mycomputer\sharedFolder). Folder Path:  Import			