



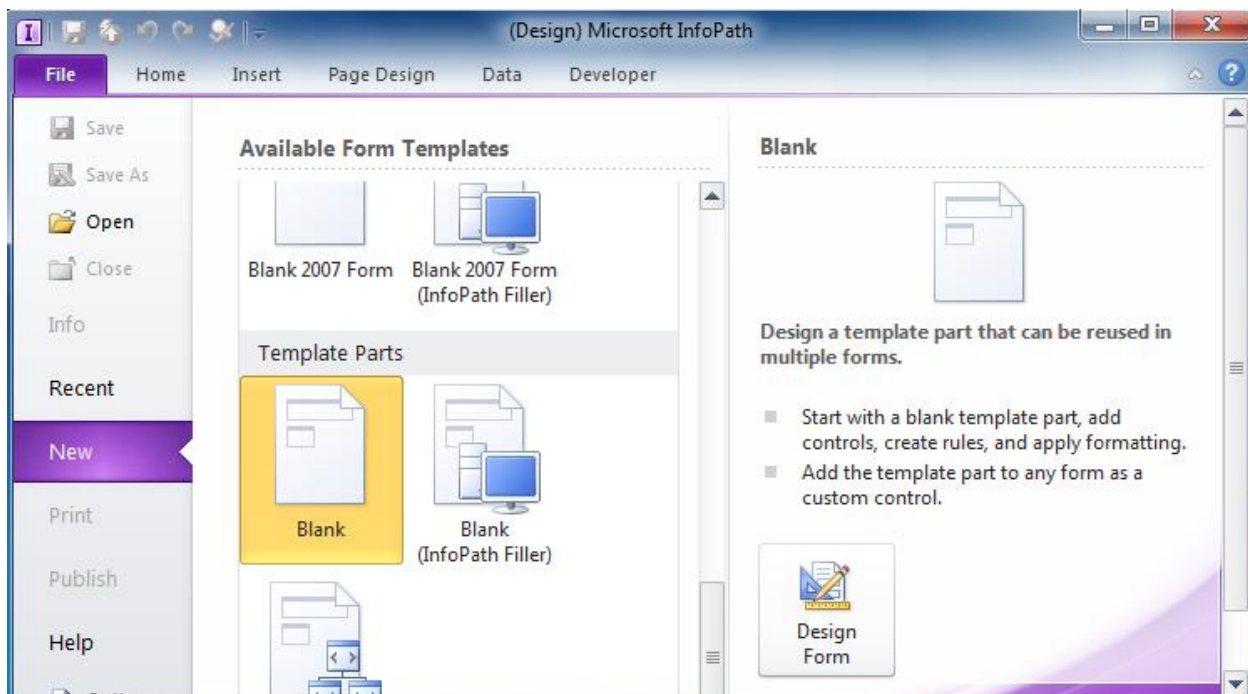
Create an XTP to Lock and Unlock DBXL forms

This tutorial allows you to create an InfoPath template part (XTP) that will lock and unlock forms that are stored in DBXL. You can reuse this XTP in any form template where you wish to provide this functionality to your users.

CREATE THE XTP

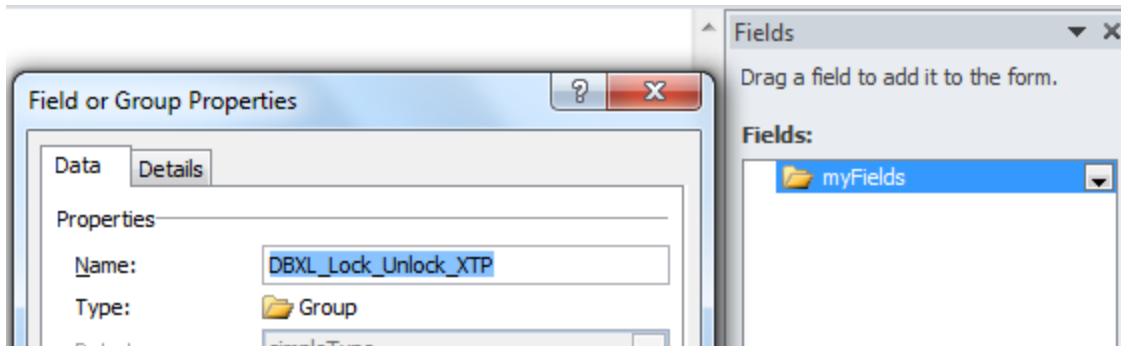
SECTION 1 – CREATE A NEW TEMPLATE PART (XTP) WITH DATA CONNECTIONS

1. Open InfoPath Designer to create a blank Template Part.

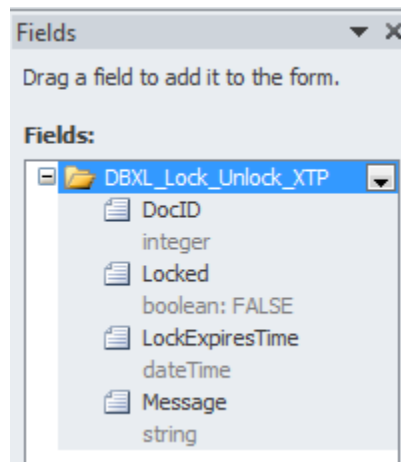


2. Rename the schema from **myFields** to **DBXL_Lock_Unlock_XTP**.



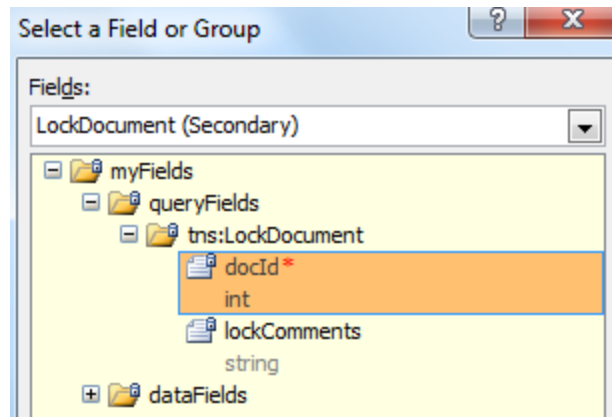


3. Add the following nodes as shown in the screenshot below:

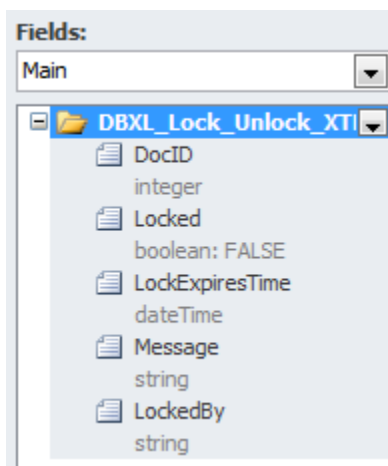


4. Add a data connection to LockDocument:
 - a. Go to Data > Data Connections > Add.
 - b. Select Receive Data and click Next.
 - c. Select SOAP Web service and click Next.
 - d. Enter the URL to the DBXLDocumentService (<http://<YOUR SERVER URL>/qdabrawebservice/dbxlDocumentService.asmx>) and click Next.
 - e. Select LockDocument and click Next.
 - f. For "Set Sample Value", enter any integer (such as 1) for the DocID parameter. Click Next.
 - g. For "Set Value", you do not need to enter a value. Simply click Next.
 - h. On the final screen of the Data Connection Wizard, uncheck the option to "Automatically retrieve data when form is opened". Click Finish.
5. Add a data connection to UnlockDocument, by following steps similar to the previous step.
6. Add a button to the canvas and change its label to "Lock".
7. Select the new button, and select File > Manage Rules.
8. Select New > Action and name this rule "Attempt lock".
9. Select Add > Set a field's value.
10. The Field will be the docid field in the LockDocument queryFields:





11. The Value will be the DocID field in the main data source of the XTP.



12. Select Add > Set a field's value.

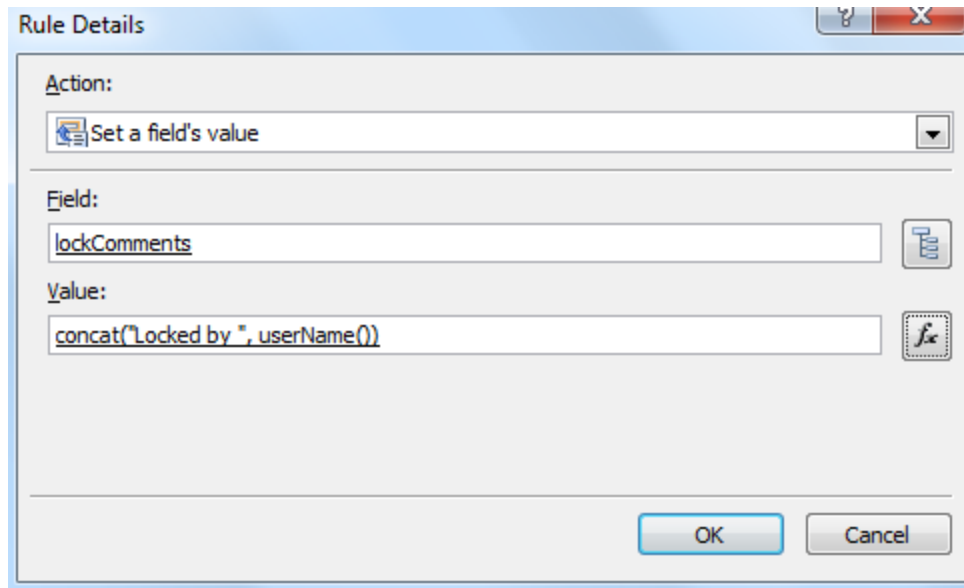
13. The Field will be the lockComments in the LockDocument queryFields.

14. The Value will be up to you; in this example we use

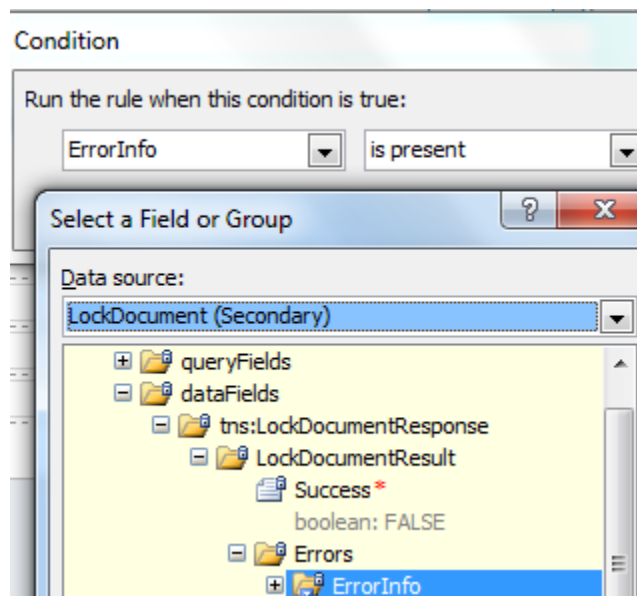
```
concat("Locked by ", userName())
```

Note: Since you're using DBXL, you could also use the Active Directory web service.



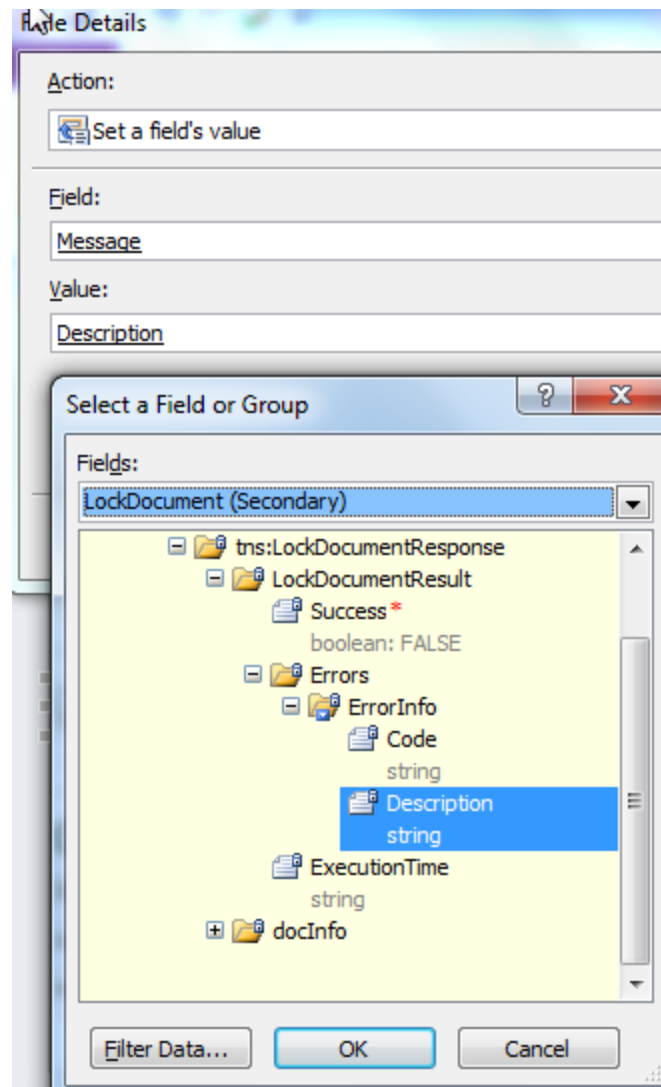


15. Select Add > Query for data, then select the LockDocument data connection.
16. Select New > Action, and name this rule "There was an error".
17. Add a condition to this rule, such that it executes only when ErrorInfo is present.



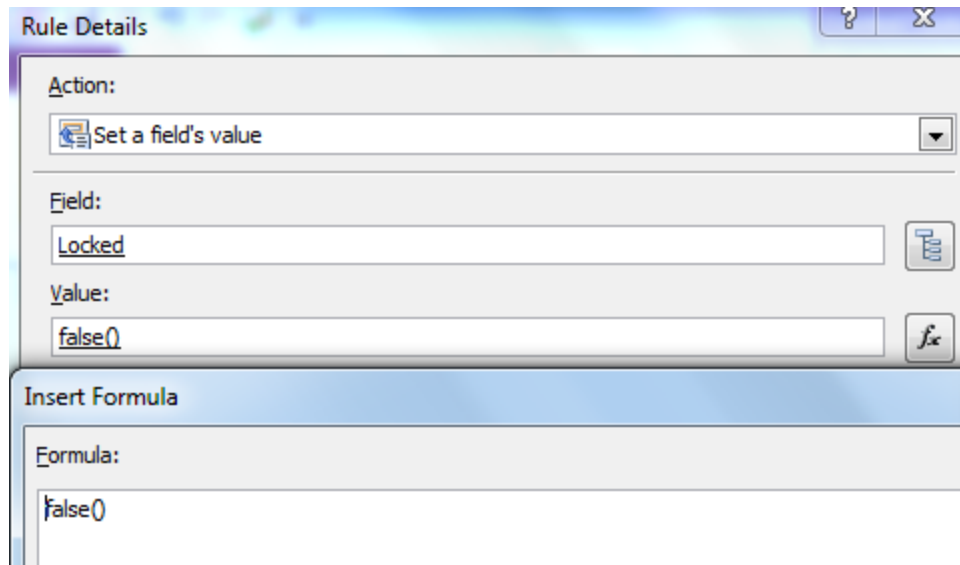
18. Select Add > Set a field's value.
19. The Field will be the Message node in the main data source.
20. The Value will be the Description node of the LockDocument data connection.



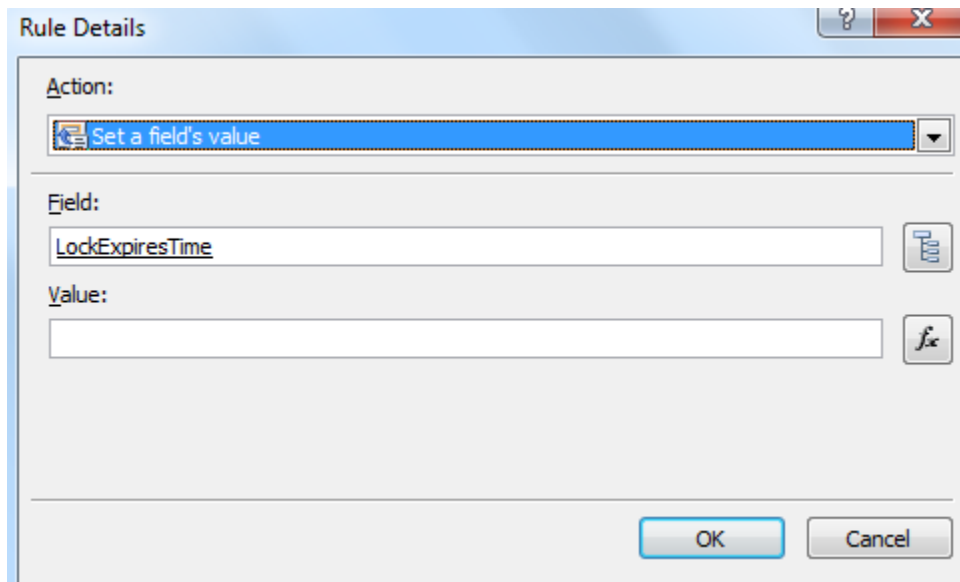


21. Select Add > Set a field's value.
22. The Field will be the Locked node in the main data source.
23. The Value will be false().





24. Select Add > Set a field's value.
25. The Field will be the LockExpiresTime node in the main data source.
26. The Value will be blank.



27. Check the checkbox for "Don't run remaining rules if the condition of this rule is met".
28. Select New > Action. Name this new rule "Lock succeeded".
29. Select Add > Set a field's value.
30. The Field will be the Locked node in the main data source.
31. The Value will be true().



Rule Details ? ✕

Action:

Field:

Value:

Insert Formula

Formula:

32. Select Add > Set a field's value.
33. The Field will be the LockExpiresTime node in the main data source.
34. The Value will be addSeconds(now(), 3600).

Rule Details ? ✕

Action:

Field:

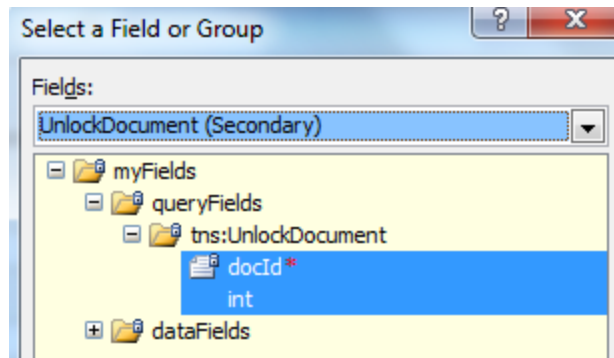
Value:

Insert Formula

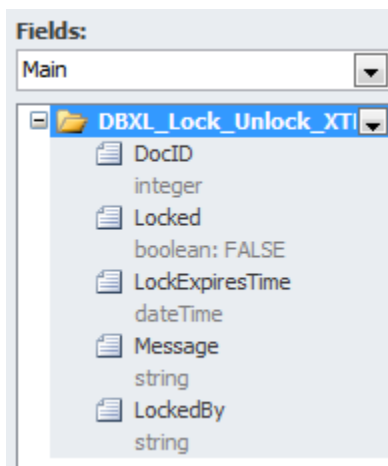
Formula:

35. Add a button to the canvas and change its label to "Unlock".
36. Select the new button, and select File > Manage Rules.
37. Select New > Action and name this rule "Attempt unlock".
38. Select Add > Set a field's value.
39. The Field will be the docId field in the UnlockDocument queryFields:



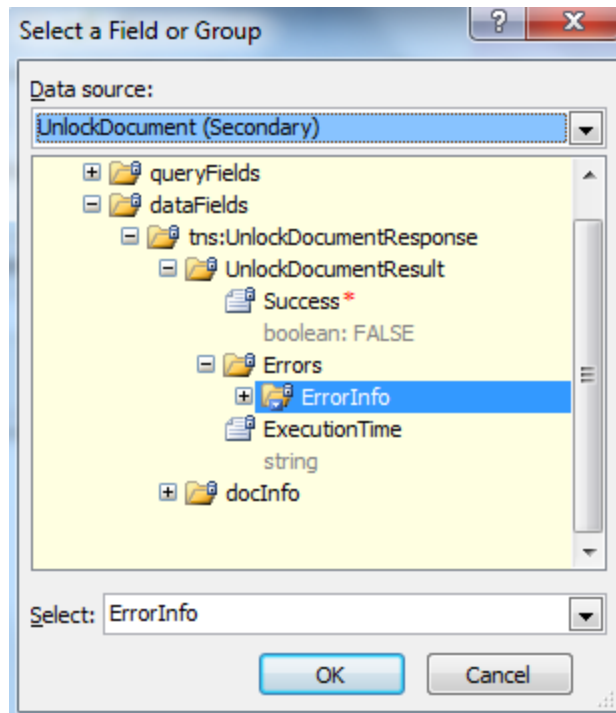


40. The Value will be the DocID field in the main data source of the XTP.

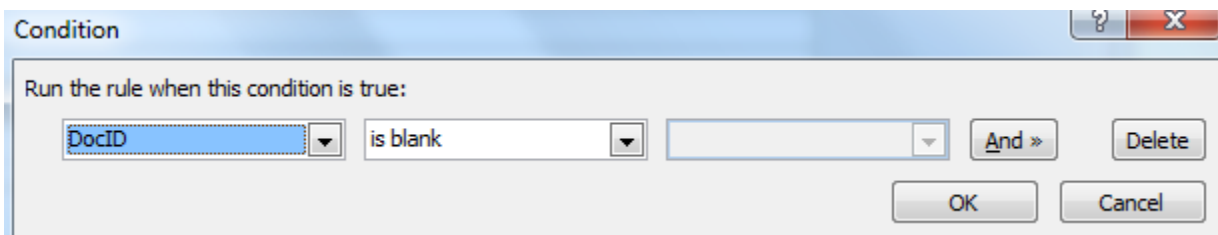


41. Select Add > Query for data, then select the UnlockDocument data connection.
42. Select New > Action, and name this rule "There was an error".
43. Add a condition to this rule, such that it executes only when ErrorInfo is present.





44. Select Add > Set a field's value.
45. The Field will be the Message node in the main data source.
46. The Value will be the Description node of the UnlockDocument data connection.
47. Check the checkbox for "Don't run remaining rules if the condition of this rule is met".
48. Select New >Action. Name this new rule "Unlock succeeded".
49. Select Add > Set a field's value.
50. The Field will be the Locked node in the main data source.
51. The Value will be false().
52. Select Add > Set a field's value.
53. The Field will be the LockExpiresTime node in the main data source.
54. The Value will be blank.
55. Add a condition to hide the Lock button if the DocID is blank. Add the same condition to the Unlock button. (This prevents locking and unlocking of new forms, i.e. forms that still lack a DocID.)



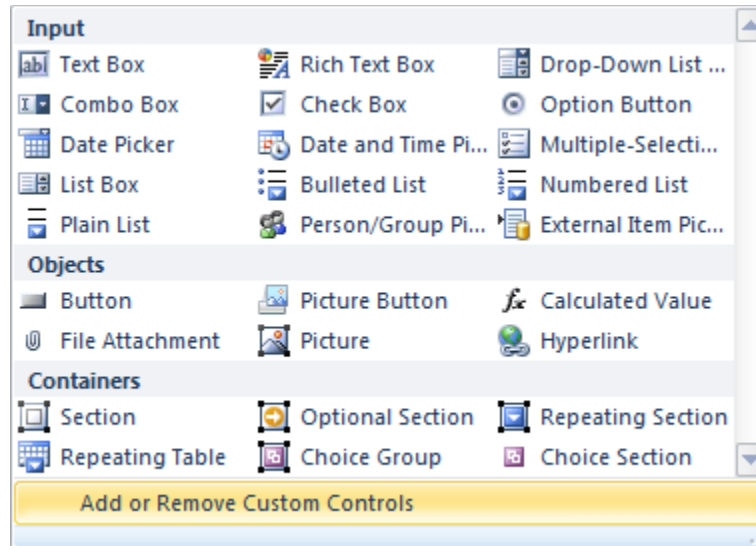
56. Finally, add the Message node into the canvas, so that the user can see any messages that are returned. Use a Calculated Value field with Auto Height and Auto Width.
57. Save the XTP to your local drive.



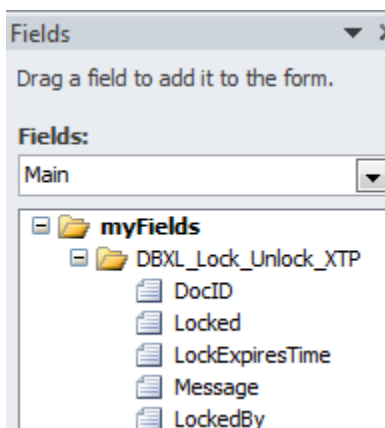
REUSE THE XTP IN ANOTHER FORM

This section will guide you through the steps on how you can use the XTP you've created in an earlier section into an actual InfoPath form to allow locking and unlocking of forms.

1. Open InfoPath Designer 2010, click Blank Form, and then click Design Form.
2. In the Controls section under the Home tab, click Add or Remove Custom Controls.



3. Click Add, select Template Part and click Next.
4. Browse to the location where you saved the XTP you've created earlier, and click Finish, then Close.
5. The XTP should now appear in the list of Custom Controls – click on it to add it on your form.
6. The controls will appear on your canvas and the group/fields should be added into your main data source, like this:



7. Design your form. For this example, we're just adding three fields: Name, Author and Description.
8. Create an on load rule to set the value of DocID to this:

```
substring-before(substring-after(/processing-instruction())[local-name(.) = "QdabraDBXL"], 'docid="'), "")
```



9. Create a data connection that submits to DBXL and create a document type in DBXL. If you need specifics on this process, please refer to the Getting Started guide included in DBXL.
10. You can also disable the Submit button if the Locked field is FALSE. This prevents users from submitting a document that has not been locked by them. (Since this only applies when a DocID is present, we add a second condition.)

Condition

Run the rule when this condition is true:

Locked is equal to FALSE and Delete

DocID is not blank And >> Delete

OK Cancel

11. Submit a form. (Remember, locking does not apply on new forms.)
12. Reopen the submitted form and click Lock to lock the form.

