



Create an InfoPath Dashboard form using QueryDocumentNodeSet

INTRODUCTION

In the past we have shown how to create a SharePoint data view to show the data stored in DBXL. Here are some references:

- [Create a SQL-based SharePoint Data View to access your DBXL Forms](#)
- [Create a SharePoint 2010 Data View that uses GetListItems to access DBXL forms](#)
- [Create a SharePoint Data View that uses GetListItems to access DBXL forms](#)

These steps involve using SharePoint Designer 2007 or 2010.

In SharePoint Designer 2013, the WYSIWYG editor is no longer available, which makes the process of creating a data view more difficult.

However, using the QueryDocumentNodeSet web method, contained in the DBXL web service, one can create a codeless, browser compatible InfoPath form which acts as a data view or a Dashboard.

QUICK DEMO: USE THE FORM WITH YOUR QDEXPENSEREPORT-SAMPLE

The sample form is set up for the QdExpenseReport-Sample that ships with DBXL. Before proceeding, ensure that this document type exists and that it contains at least two documents.

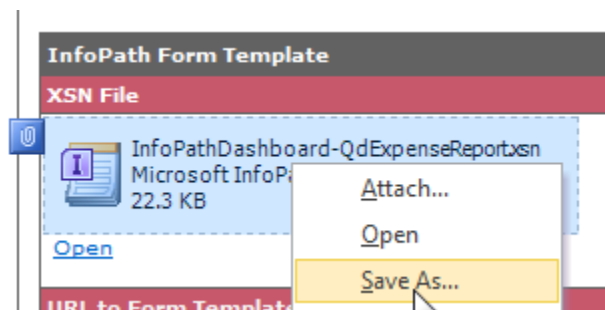
These steps will associate the Dashboard form with your instance of DBXL.

1. Open the DBXL Administration Tool (DAT) by going to <http://<your-server-name>/QdabraWebService/default.htm> and clicking on the first link on the page.
2. Click **New Configuration**.
3. Attach the **InfoPathDashboard-QdExpenseReport.xsn** form template and provide a name, such as "InfoPathDashboard-QdExpenseReport".



General	Database	Permissions	Share
Document Type Details			
Name			
InfoPathDashboard-QdExpenseReport			
Description			
InfoPath Form Template			
XSN File			
 InfoPathDashboard-QdExpenseReport.xsn Microsoft InfoPath Form Template 23.8 KB			

4. Click **Save**, and then click **OK** in the confirmation dialog.
5. Right click on the File Attachment control and select Save As.



6. Save the XSN to your local machine. DBXL will have fixed up all data connections so that they point to your DBXL URL.
7. Right click on the XSN and select **Design**.
8. Preview the form template.



InfoPath Dashboard Form

QdExpenseReport-Sample



DocID 209

Report Date	Expense Code	Employee Name	Manager Name	Purpose
7/5/2011	TRAV01	John Doe	Jim Smith	Customer Site Visits

Expense Report Items

Date	Amount	Category	Description
6/30/2011	\$783.00	Transportation	Air Fare
6/30/2011	\$137.00	Lodging	Hotel

DocID 223

Report Date	Expense Code	Employee Name	Manager Name	Purpose
2/15/2013		Ernesto Machado	Patrick Halstead	This is a new expense report

Expense Report Items

Date	Amount	Category	Description
2/7/2013	\$110.00	Entertainment	test1
2/6/2013	\$450.00	Entertainment	test2



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- Optionally, publish to form template to a SharePoint 2010 site, and open the form in the browser.

MODIFY THE DASHBOARD FORM TO WORK WITH A DIFFERENT FORM

To use the Dashboard form with a different form, we must first complete the steps in the previous section. We also assume the following:

- [Report Builder](#) has been installed.
- The DBXL Document Type has already been created. (For information on this, refer to the [Getting Started](#) tutorial.)
- At least two documents have been submitted.
- The form contains header information and child (repeating) data.

To configure the Dashboard for your document type, follow these steps:

- Use Report Builder to generate the query for YOUR Document Type. For details on using Report Builder, please refer to the link above. In this query,
 - Under **Fields to Retrieve**, you are asked to select a **Base Path**. We need to flatten the data, which means we need to select the repeating node as our **Base Path**.

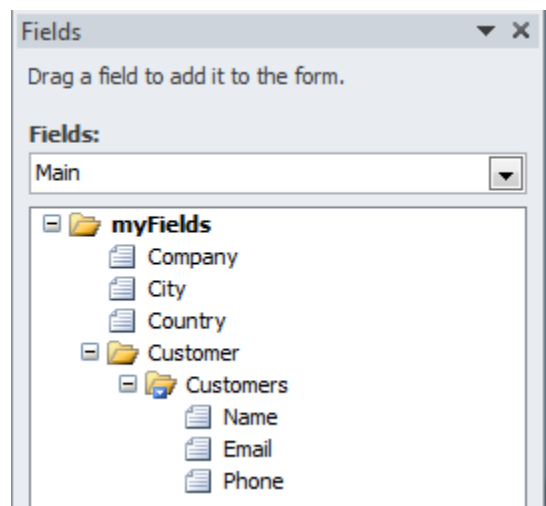


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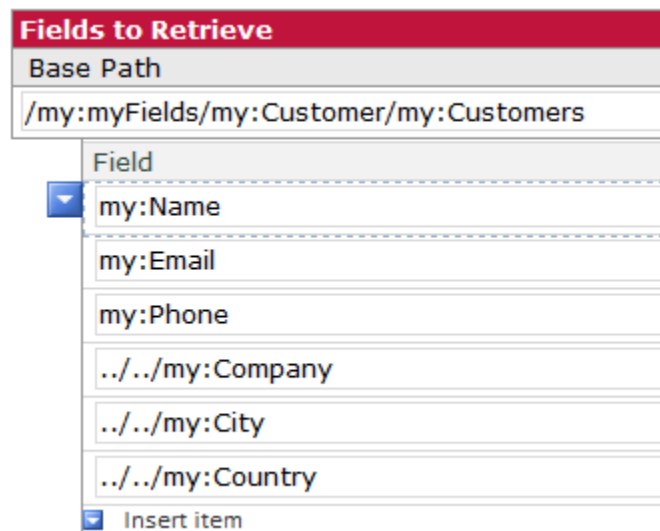
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If this is your form schema:



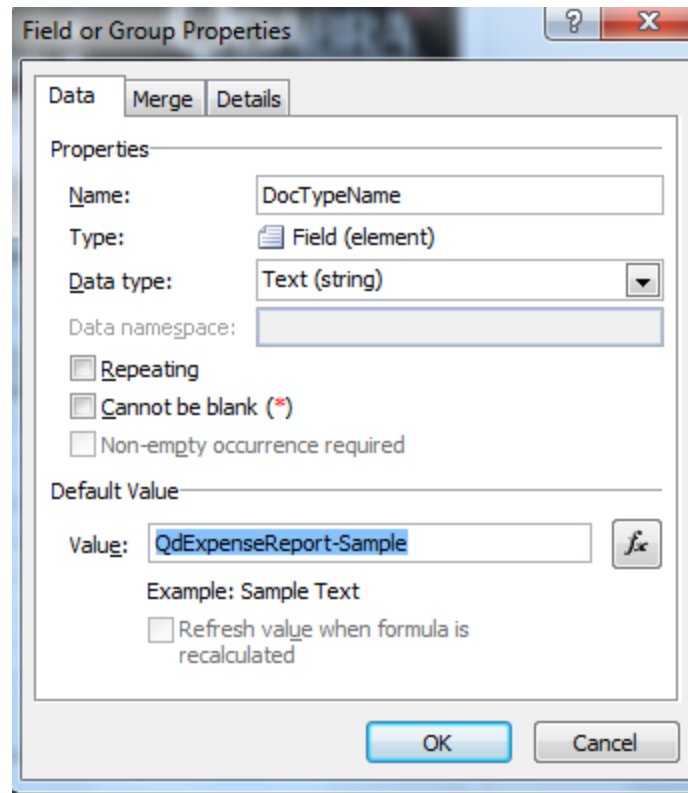
Then the **Base Path** will be **/my:myFields/my:Customer/my:Customers**.

- b. Add all the fields you wish to display.
- c. For nodes that exist outside of the repeating node, you will have to type in a manual path.



2. When finished, copy the query generated by Report Builder.
3. Right click on the Dashboard form and select **Design**.
4. Go to **Data > Data Connections**. Select the existing data connection and click **Modify**.
5. Click **Next** twice on the Data Connection Wizard to reach the **Sample Value** Parameter screen. Enter the new query in the parameters screen.
6. Click Next and enter the same query into the **Set Value** parameter screen.
7. Click Next twice and then Finish the data connection wizard. Close the Data Connections dialog.
8. Change the default value of the DocTypeName node to match your document type.





The 'Field or Group Properties' dialog box is shown with the 'Data' tab selected. The 'Properties' section contains the following fields and options:

- Name:** DocTypeName
- Type:** Field (element)
- Data type:** Text (string)
- Data namespace:** (empty)
- ☐ Repeating
- ☐ Cannot be blank (*)
- ☐ Non-empty occurrence required

The 'Default Value' section contains:

- Value:** QdExpenseReport-Sample
- Example:** Sample Text
- ☐ Refresh value when formula is recalculated

Buttons at the bottom: OK, Cancel.

9. Change the column headers so that they match your data.

For example, from this:

DocID				
Report Date	Expense Code	Employee Name	Manager Name	Purpose
"header" data				
Expense Report Items				
Date	Amount	Category	Description	
repeating ("child") data				
Section				
Section				
Section				
☒ Repeating Section				

To this:



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DocID

Company	City	Country

Contacts		
Name	Email	Phone

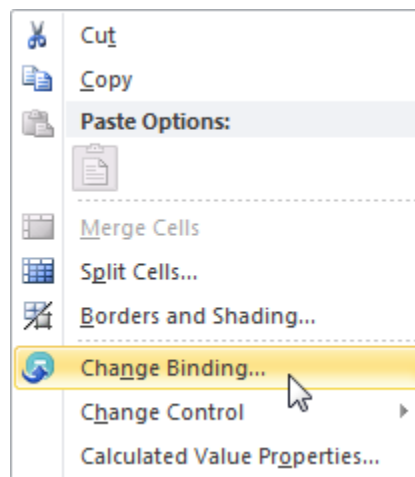
Section

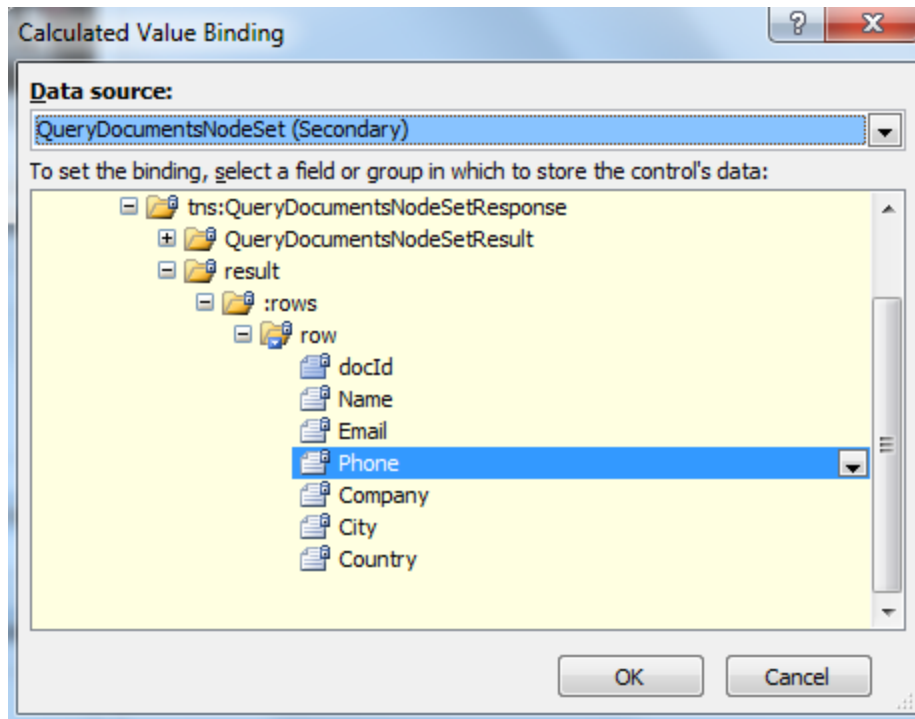
Section

Section

☒ Repeating Section

10. Rebind the Calculated Value controls in both the header and children tables. To do this, simply right click on each Calculated Value and select the node from the secondary data source which should be displayed.





11. Make any other changes in the canvas design, as desired. This may include changing data types on the Calculated Values, column widths, etc.
12. Save the updated Dashboard form.
13. Preview the form to check your progress.



InfoPath Dashboard Form

CustomerContact



DocID 240

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DocID 241

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14. Publish to SharePoint when finished to see it in the browser.



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