



## Add a DBXLDocID column to the SharePoint form library when using the Event Receiver

When we submit a document to DBXL using the DBXL v2.8 Event Receiver, the XML form stored in SharePoint doesn't have a reference to DBXL - that is, there's no DBXL Processing Instruction (PI) and no DBXL DocID. However, sometimes it is useful to surface this data and add a column that shows users the DBXL DocID. This tutorial will show you how to accomplish this.

This tutorial assumes you have already set up the Event Receiver and it's working as expected. If you need information on installing or setting up the Event Receiver, please refer to the Getting Started document.

The most important aspect of this process is that the form requires a unique value. Usually using the form name is enough, since this must be unique to avoid unwanted overwriting in the SharePoint Form Library. Here's the FormName in the data connection that submits to the SharePoint form library:

 The screenshot shows a "Data Connection Wizard" dialog box with a blue title bar. The main area has a yellow background on the left and a white background on the right. The right side contains the following text and fields:
 

This wizard helps you specify a data connection for submitting the form to a document library on a SharePoint site. The form will be submitted with the file name specified below.

**Document library:**  
  
 Example: http://www.example.com/yourlibrary/

**File name:**  
   
 Example: Status report or concat("Status Report - ", field1)

Allow overwrite if file exists

We'll assume the FormName is unique and that it is stored in the xpath:

*/my:myFields/my:FormName*

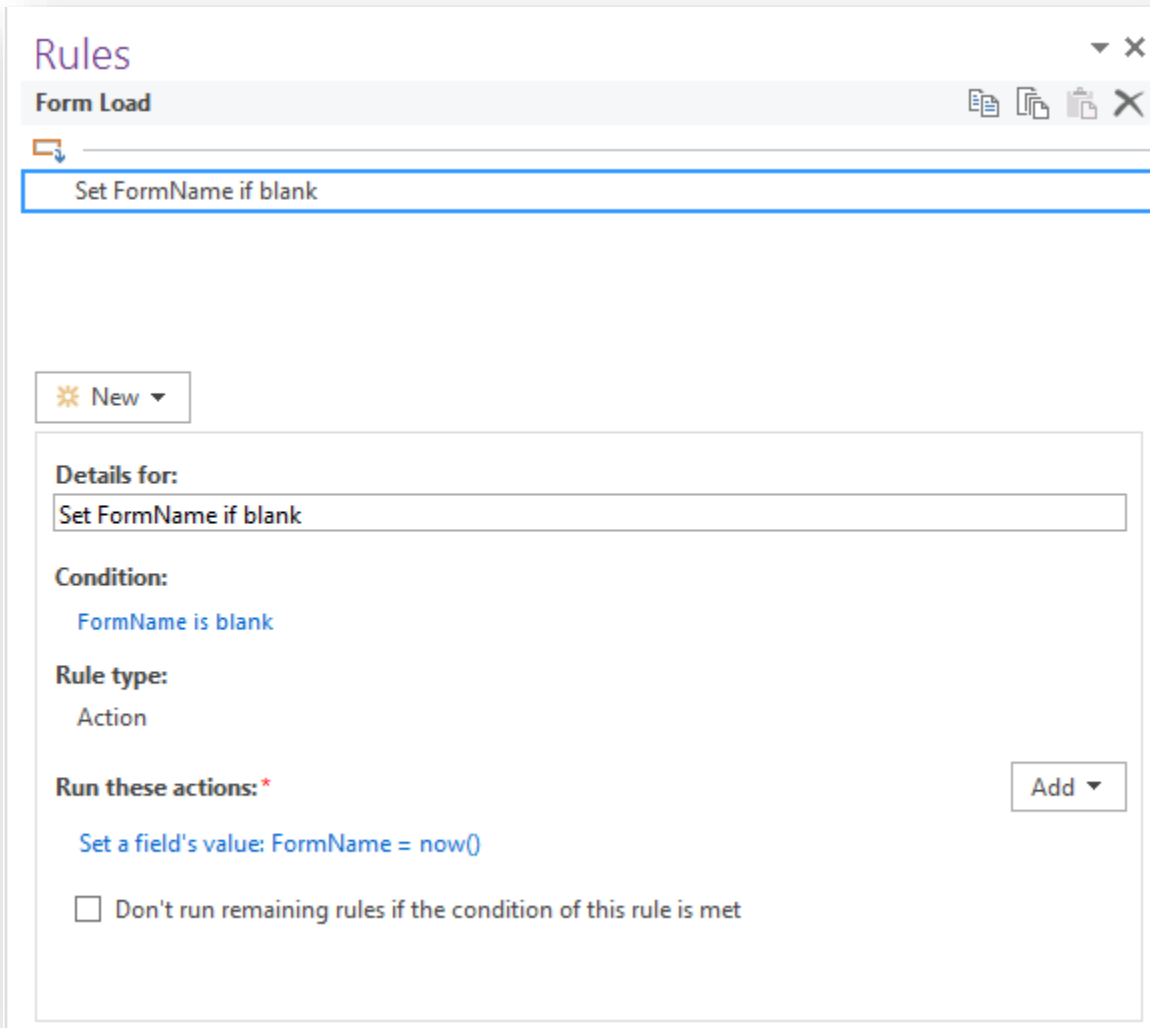


<http://www.qdabra.com>

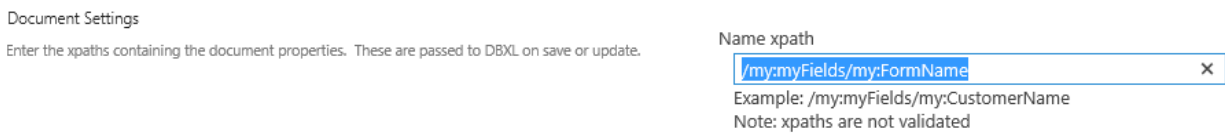
Last updated on 12/18/2013 6:26 PM

Copyright © 2006-2011 Autonomy Systems, LLC. All rights reserved.

Here is how we have defined the FormName in our form:



1. In the DBXL Settings for the SharePoint Form Library, add the FormName xpath:



2. Save the DBXL Settings and ensure these are working.

This means that when a document is submitted, you'll see the unique form name in the DBXL Admin Tool's Document tab:



<http://www.qdabra.com>

Last updated on 12/18/2013 6:26 PM

Copyright © 2006-2011 Autonomy Systems, LLC. All rights reserved.

General	Database	Permissions	SharePoint	Documents
<b>Export Documents</b>				
<b>Import Documents</b>				
<b>Query Documents</b>				
To limit the number of documents shown, enter a starting Doc. ID and the number of documents to show. You can then jump forward or backward by the number of documents shown. To search for a Document with a specific Ref. ID, type the ID into the field.				
Starting Doc. ID:	339	Ref. ID:		Range: 20
<b>If reshredding more than 100 documents, please use the DBXL Migration tool.</b>				
<b>Documents</b>				
Doc. ID	Ref. ID	Version #	Name	Author
339	1	1	i:0#.w autonomysystem - 2013-12-18T11:33:34	i:0#.w autonc

This also means the Name column in the SharePoint Form Library also shows the same name:

⊕ new document or drag files here

All Documents Merge Documents My Documents ... Find a file

✓	Name
✓	i_0_w_autonomysystems_ernestom - 2013-12-18T11_33_34 ✱

3. Open the InfoPath form in Design mode.
4. Add a node for the DBXL DocID in the main data source.



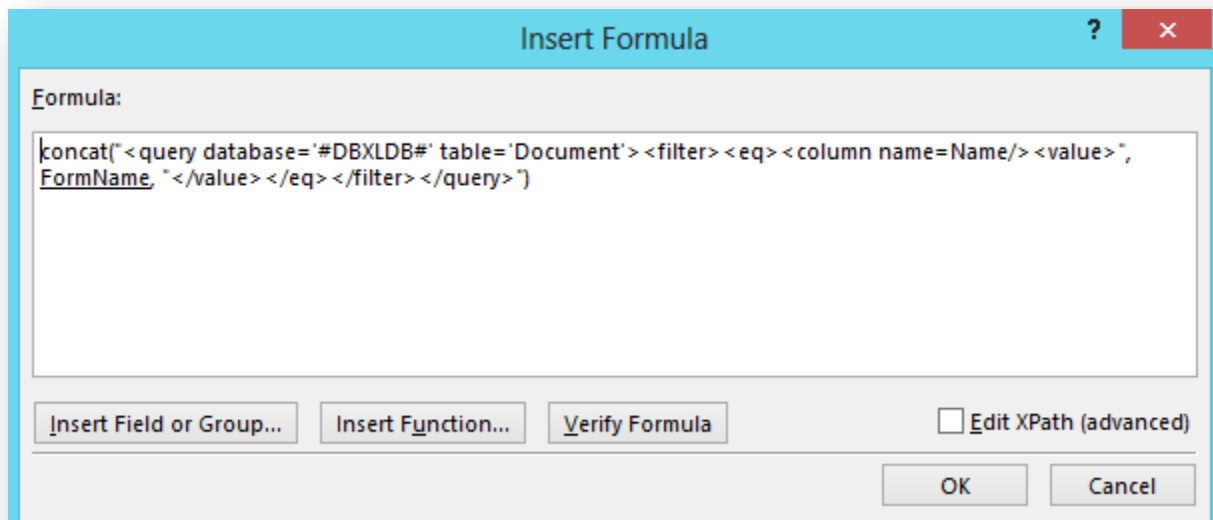
The screenshot shows a dialog box titled "Add Field or Group". It has a light blue header with a question mark icon and a red close button. The main area contains several fields and checkboxes:

- Name:** A text box containing "DBXLDocID".
- Type:** A dropdown menu showing "Field (element)".
- Data type:** A dropdown menu showing "Whole Number (integer)".
- Data namespace:** An empty text box.
- Default value:** An empty text box.
- Example:** The text "1234" is displayed below the default value field.
- Repeating:** An unchecked checkbox.
- Cannot be blank (\*):** An unchecked checkbox.
- Non-empty occurrence required:** An unchecked checkbox.
- Buttons:** "OK" and "Cancel" buttons are located at the bottom right.

5. Create the data connection that will retrieve the DBXL Doc ID.
  - i. Go to **Data > Data Connections > Add**.
  - ii. Select **Receive Data** and click **Next**, then select **SOAP Web Service** and click **Next**.
  - iii. Enter the URL to the QueryDB web service (<http://<servername>/QdabraWebService/QueryDB.asmx>) and click **Next**.
  - iv. Select **GetColumnsXMLStrQuery** and click **Next**.
  - v. Enter `<query database='#DBXLDB#' table='Document' maxrows='2' getSample='true'></query>` for the **queryXML** parameter and click **Next**. You'll repeat this step one more time.
  - vi. Click **Next**, uncheck "Automatically retrieve data when form is opened" and click **Finish**. Then **Close** the Data connections window.
6. Modify the rules on the submit button to perform the following:
  - i. The first rule will simply submit using the SharePoint Library Submit data connection.
  - ii. The second rule will have two actions.
    - a. First, set the value of the queryXML to

```
concat("<query database='#DBXLDB#' table='Document'><filter><eq><column name='Name'/><value>",
xdXDocument:get-DOM()/my:myFields/my:FormName, "</value></eq></filter></query>")
```





- b. Second, query using the data connection GetColumnsXMLStrQuery.
- iii. The third rule will set the DBXL DocID node in the main data source to the DocID obtained as a result of the GetColumnsXMLStrQuery data connection.



The screenshot shows a 'Rule Details' dialog box with the following configuration:

- Action:** Set a field's value
- Field:** DBXLDocID
- Value:** DocID

- iv. The final rule will submit the form (again to the SharePoint Form Library) and then close the form.
7. Go to File > Form Options > Property Promotion and promote the DBXL DocID field so that it becomes a column in the SharePoint form library.
8. Save the form. Publish it to the SharePoint form library.
9. In the DBXL Admin Tool, attach this latest template to the document type and save it.
10. To test:
  - i. Open an existing document and resubmit it.
  - ii. Create a new document.

In both scenarios, the DBXL DocID should now show in the new column.

Name	Modified	Modified By	Checked Out To	DBXLDoc ID
2013-12-18T14_24_35	A few seconds ago	ernestom		351

Note: If DBXL and SharePoint are installed on different servers, please execute the additional steps below.

1. Create a Data Connections library on the SharePoint site.
2. Convert the QueryDB data connection to a UDC.
3. Navigate to the Data Connections library using Internet Explorer and download the newly created UDC file.



4. Open the UDC file using Notepad or another text editor.
5. Within the UDC file, change this line:

```
<!--udc:Authentication><udc:SSO AppId="" CredentialType="" /></udc:Authentication-->
```

to

```
<udc:Authentication><udc:SSO AppId='<YOUR_APP_ID>' CredentialType='NTLM'  
></udc:Authentication>
```

6. Save and close the UDC file, then upload it to the Data Connections library, making sure to overwrite the existing file.
7. Save and republish the form.

This is needed to achieve the “jump” between the site (or server) where DBXL is installed and the site (or server) where SharePoint is located. More info on this process can be found in the Getting Started document.

If you have questions about the information in this document, please contact us via [Support@Qdabra.com](mailto:Support@Qdabra.com) for assistance.

