

MODULE 1: INTEGRATED SCENARIO ON SHAREPOINT 2010

The first two modules of this training session will illustrate the main scenarios when using DBXL. We begin with the “classic” scenario, that is, the scenario Qdabra has recommended to its customers using DBXL v2.7 or earlier versions.

We call this scenario “Integrated” because DBXL is installed on the **SharePoint – 80** site. This module will be executed on SharePoint 2010, whereas Module 2 will present a different scenario preferred for SharePoint 2013.

Here is an overview of this module:

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CHECK PERMISSIONS TO ENSURE YOU'RE A DBXL ADMINISTRATOR

These steps will be demonstrated by the presenter.

To successfully complete this training lab, you must be a DBXL Administrator. The following steps will show you how to check whether you are an administrator, and add yourself if you are not.

1. Log on to the server where DBXL is installed using Remote Desktop.
2. In the Qdabrawebservice folder, find the web.config file. For example:
C:\inetpub\wwwroot\wss\VirtualDirectories\80\QdabraWebService
3. Open the web.config file in a text editor, such as Notepad.
4. Look for the following: **AdminGroupAlias** and **DbxlAdminAlias**. You'll find a section that looks like this:

```
<add key="BrowserGroupAlias" value="NT AUTHORITY\Authenticated Users" />
<add key="ReaderGroupAlias" value="" />
<add key="WriterGroupAlias" value="" />
<add key="AdminGroupAlias" value="<machine name>\DbxlAdmins" />
<add key="DbxlAdminAlias" value="<machine name>\DbxlAdmins" />
```

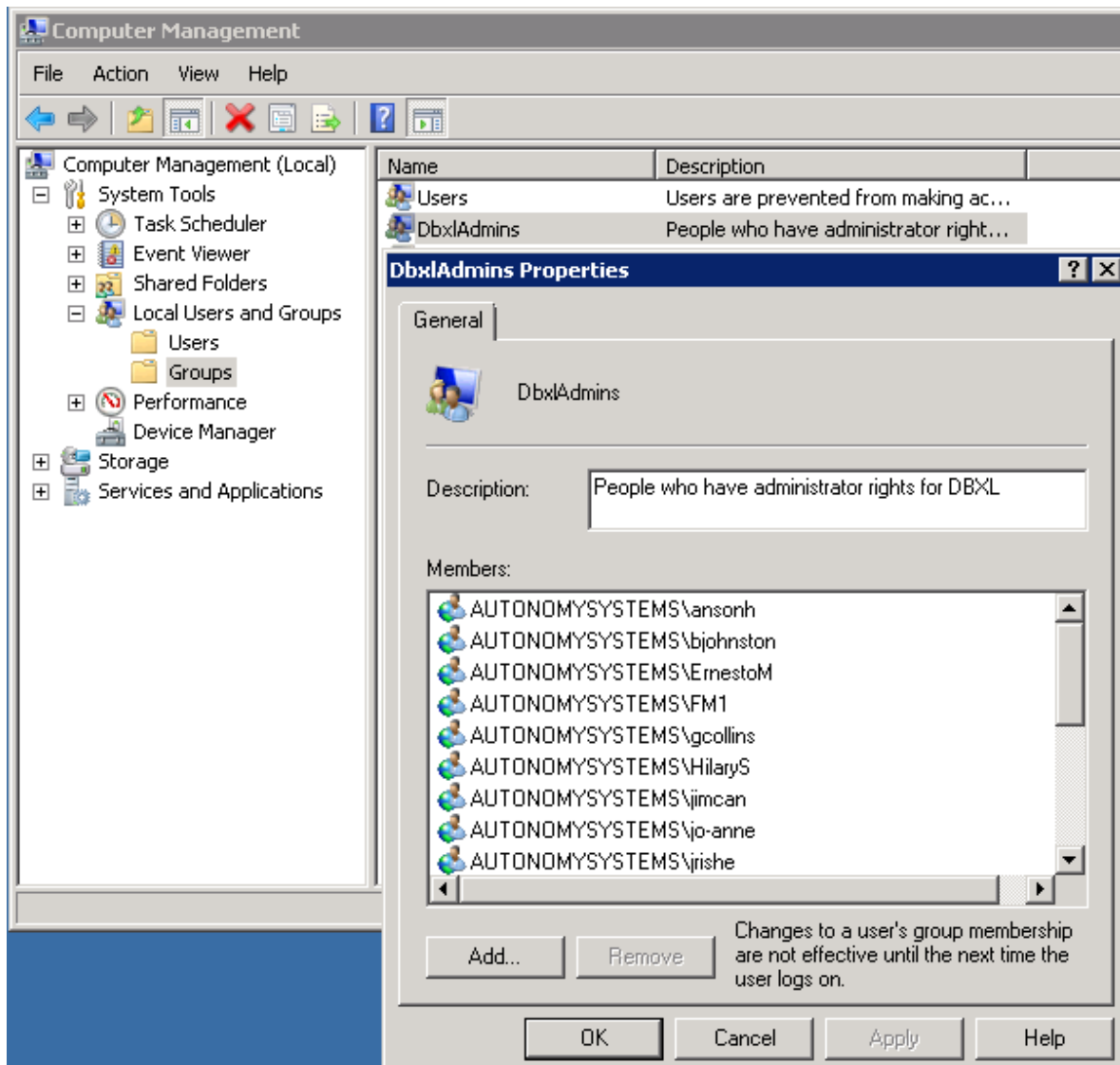
5. Each of these keys will be assigned a value, that is, a group.

Notice that during installation DBXL creates a group called DBXLAdmins on the machine. This group, by default, is assigned to both keys: **AdminGroupAlias** and **DbxlAdminAlias**.

To add a DBXL Administrator all you need to do is add users to the DbxlAdmins group.

6. Open **Computer Management**.
7. Under **System Tools > Local Users and Groups**, locate the DbxlAdmins group. Right click to see its **Properties**.
8. Add yourself to this group.

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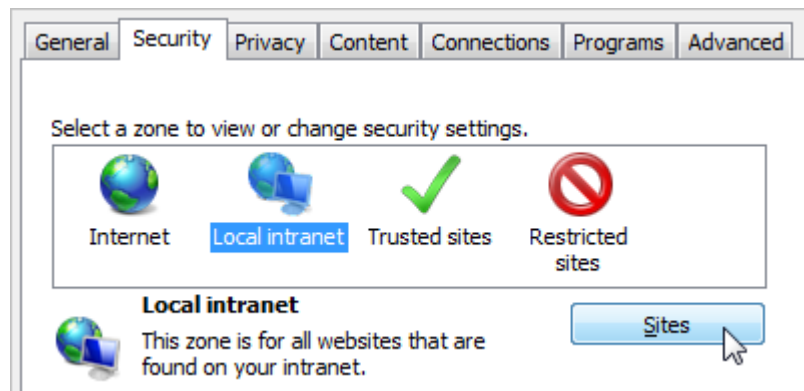


- Click OK and log out of the server.

ADD THE DBXL SITE TO LOCAL INTRANET

Next we will add the server to Internet Explorer's Local Intranet zone to avoid numerous credential prompts as well as permission issues.

10. In Internet Explorer, go to *Internet Options*, switch to the **Security** tab, select **Local intranet** and then click **Sites**.



11. In the *Local intranet* window, click **Advanced**.
12. Enter the site and then click **Add**.
13. It should now be listed in the local intranet websites – click **Close**, and then click **OK** twice to close all the dialogs.

MODIFY YOUR FORM SO THAT IT SUBMITS TO DBXL

In the Integrated scenario, the InfoPath form template needs to be configured to submit to the DBXL web service.

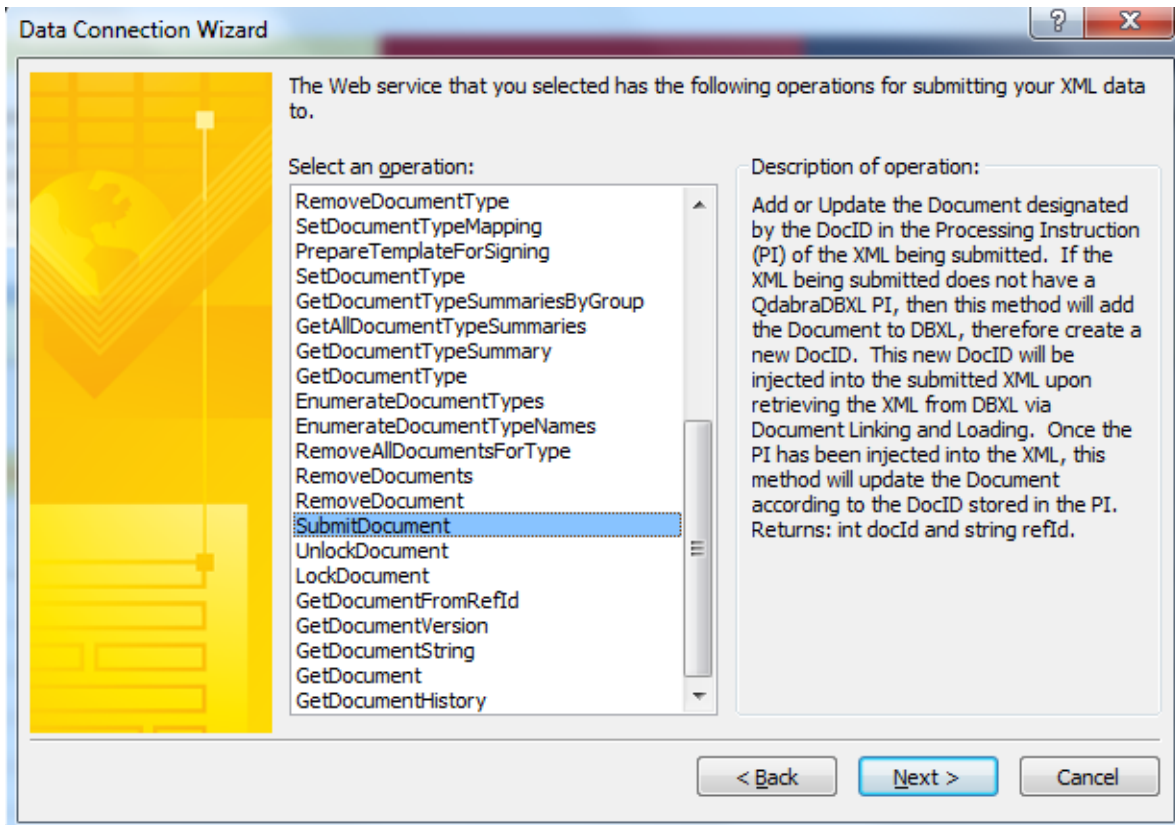
14. Open your InfoPath form template (XSN) in design mode.

You could follow these steps for any InfoPath form template. For the purposes of this training module, we are using a sample form created by Microsoft and included in InfoPath 2007.



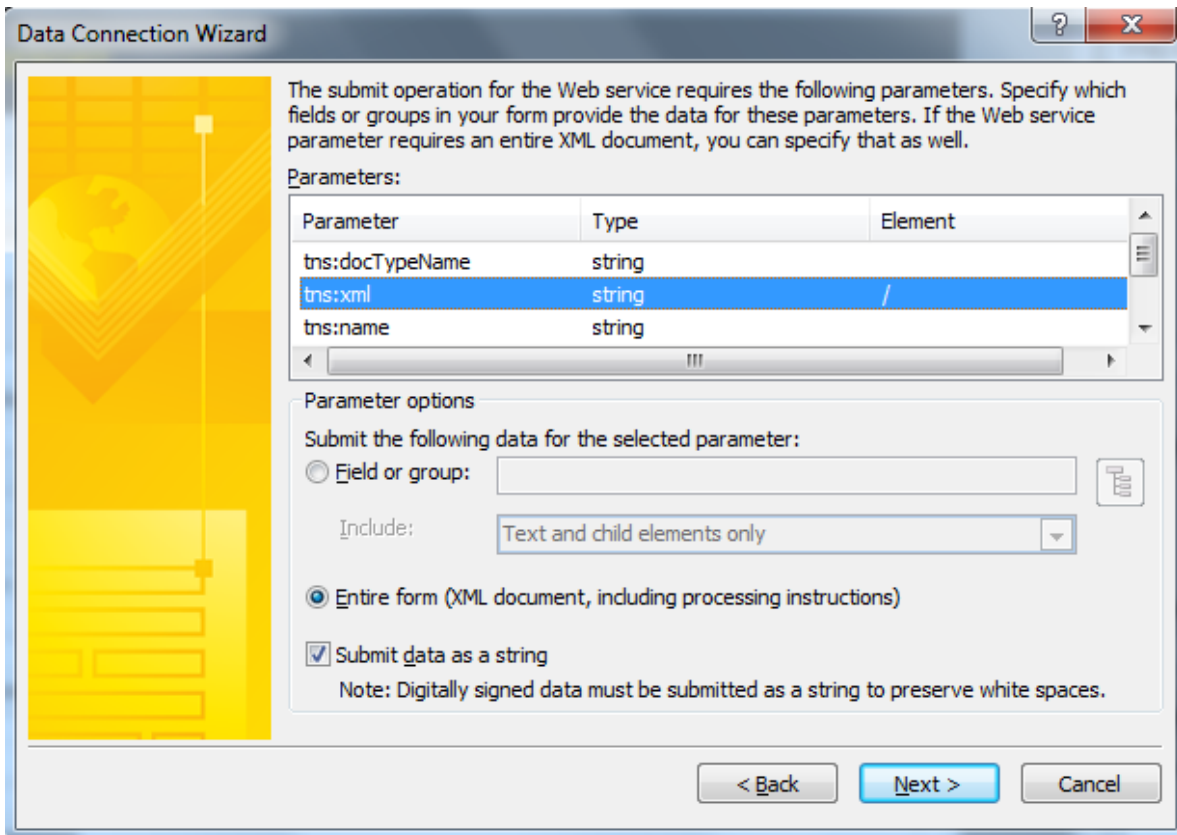
15. Switch to the **Data** tab and click **Data Connections**.
16. You'll see a data connection called **Main Submit**. Since we want the form to submit to DBXL (instead of using this data connection), let's **Remove** this data connection.
17. Now click on **Add**. This will load the Data Connection Wizard.
18. Select **Submit data** and click **Next**, then select "**To a web service**" and click **Next**.
19. In the web service field, enter
<http://<yourservername>/qdabrawebservice/DbxlDocumentService.asmx> and click **Next**.
20. Select **SubmitDocument** and click **Next**.

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Next, you'll configure the parameters used to submit to DBXL.

21. Ignore the first parameter, called **tns:docTypeName**. In this scenario, DBXL will be able to automatically detect this. There are other scenarios where this value will need to be defined.
22. Select the second parameter, named **tns:xml**. Under **Parameter options** select the **Entire form (XML document, including processing instructions)** radio button. Check the **Submit data as a string** checkbox.



That's the only required parameter. The next three are optional parameters.

23. Select the **tns:name** parameter.

This parameter, along with the **Author** and **Description**, are called "DBXL tokens". These are displayed in the document list in the **Documents** tab in DAT.

24. Select the radio button **Field or Group** in the **Parameter options** section.

25. Click the Modify button next to the **Field or Group** text box. The **Select a Field or Group** dialog will appear.

26. Select the node **/my:expenseReport/my:expenseCode**, click **OK** and check the **Submit data as a string** checkbox.

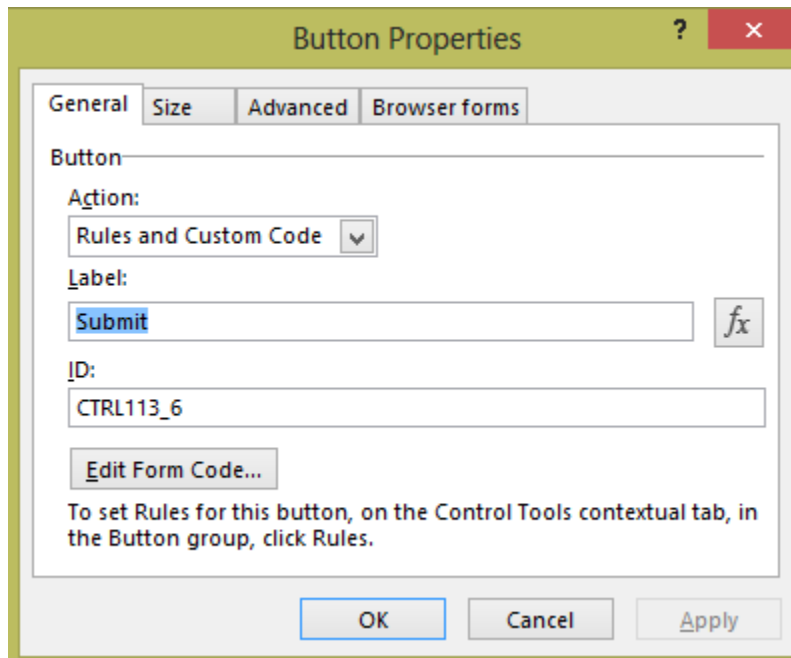
27. Select the **tns:author** parameter.

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28. Select the radio button **Field or Group** in the **Parameter options** section.
29. Click the Modify button next to the **Field or Group** text box. The **Select a Field or Group** dialog will appear.
30. Select the my:name field under my:employee, click **OK** and check the **Submit data as a string** checkbox.
31. Select the **tns:description** parameter.
32. Select the radio button **Field or Group** in the **Parameter options** section.
33. Click the Modify button next to the **Field or Group** text box. The **Select a Field or Group** dialog will appear.

Parameters:		
Parameter	Type	Element
tns:xml	string	/
tns:name	string	/my:expenseReport/my:expenseCode
tns:author	string	/my:expenseReport/my:employee/my:name
tns:description	string	/my:expenseReport/my:purpose

34. Click **Next**. Click **Finish**. Click **Close** to exit the **Data connections** dialog.
35. Find the **Submit** button at the bottom of the form. Right click on it and select **Button Properties**.
36. In the **General** tab, change the **Action** dropdown to "Rules and Custom Code" and change the label to "Submit". In the **Browser forms** tab, change the **Postback settings** to **Always**. Click **OK**.

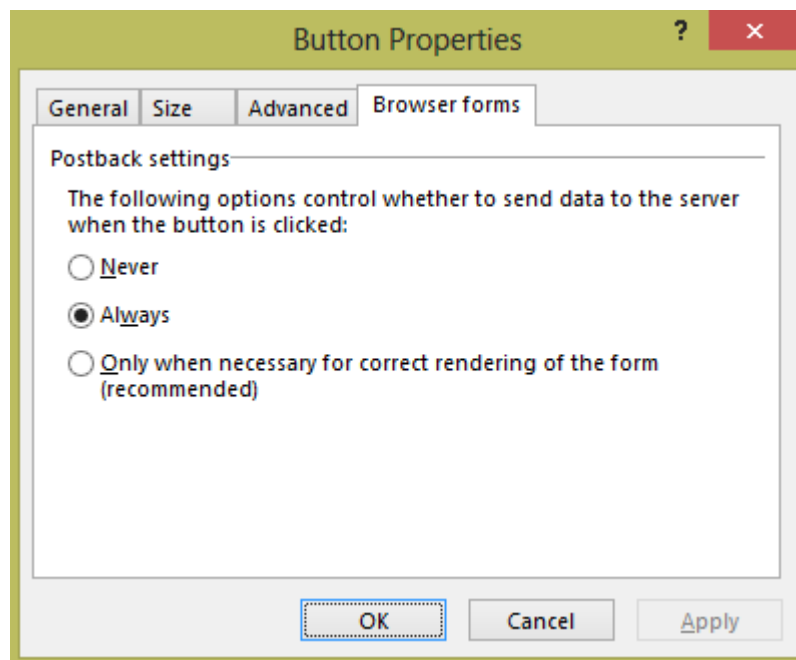


The 'Button Properties' dialog box is shown with the 'General' tab selected. The 'Button' section contains the following fields:

- Action:** A dropdown menu set to 'Rules and Custom Code'.
- Label:** A text box containing 'Submit' with a function icon (fx) to its right.
- ID:** A text box containing 'CTRL113_6'.
- Edit Form Code...** button.

Below these fields is a note: 'To set Rules for this button, on the Control Tools contextual tab, in the Button group, click Rules.'

At the bottom are 'OK', 'Cancel', and 'Apply' buttons.



The 'Button Properties' dialog box is shown with the 'Browser forms' tab selected. The 'Postback settings' section contains the following options:

The following options control whether to send data to the server when the button is clicked:

- ☐ **N**ever
- ☒ **A**lways
- ☐ **O**nly when necessary for correct rendering of the form (recommended)

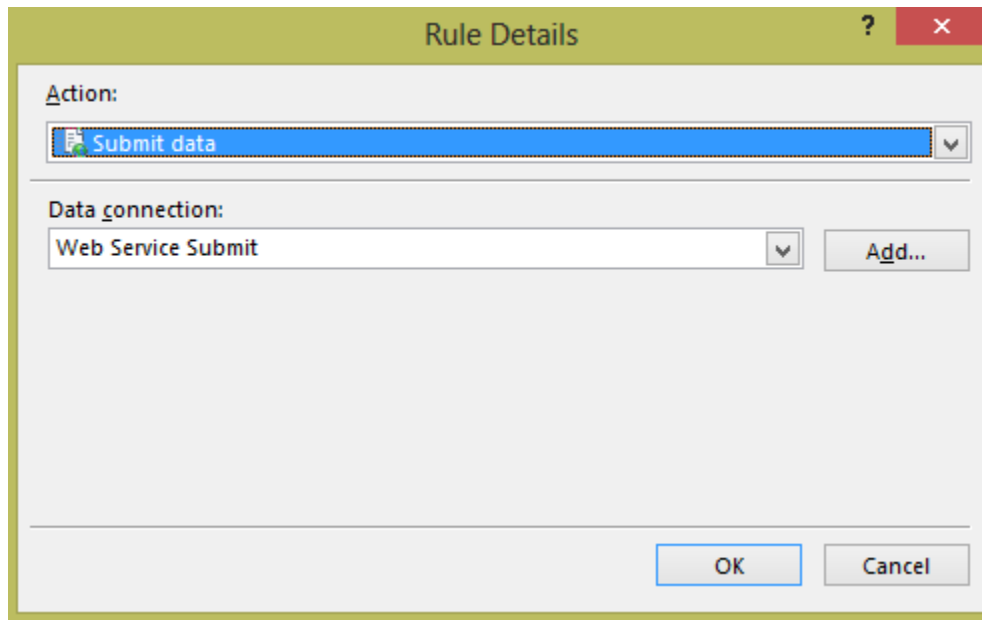
At the bottom are 'OK', 'Cancel', and 'Apply' buttons.

37. Select the button, then click on **Home > Manage Rules**.

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38. In the rules taskpane, click **New > Action > Add > Submit data**.

39. There's only one data connection to select, so click OK.



40. Select **Add > Close form** and click **OK**.

41. Save the updated form by selecting **File > Save**. When saving, save the form as an InfoPath 2010 Web Browser Form. Then close the InfoPath designer.

Your form is now configured to submit to the DBXL document service.

CREATE A DOCUMENT TYPE CONFIGURATION

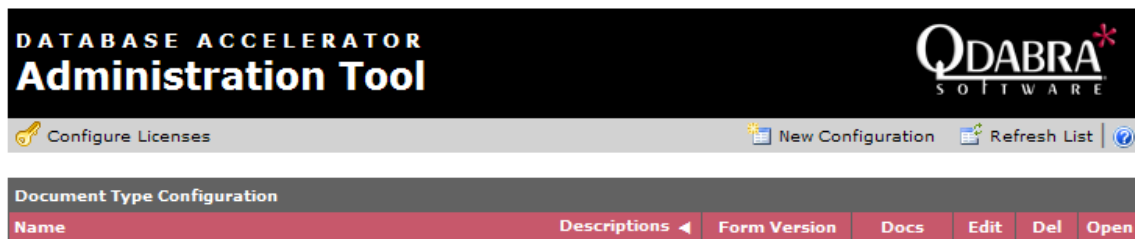
In this section, we will use the DBXL Administration Tool (DAT).

42. Open Internet Explorer and access the URL
<http://<machinename>/QdabraWebService/default.htm>.



43. Once the page opens, click the **DBXL Administration Tool** hyperlink.

InfoPath will open the DBXL Administration Tool (DAT).



Now you can create a new configuration in DAT.

44. In DAT, click on **New Configuration**.

45. Type **ExpenseReport** into the **Name** field.

If you might be executing this training on the same server as other users, you might want to provide a name unique from the other users, for example, **ExpenseReport_JohnSmith**.

46. Under **InfoPath Form Template**, click on **Click here to attach a file**.

47. Select the XSN saved in the previous section and click **Insert**.

DATABASE ACCELERATOR
Administration Tool

Document Type: ExpenseReport

General Database Permissions Share

Document Type Details

Name
ExpenseReport

Description

InfoPath Form Template

XSN File

InfoPathExpenseReport.xsn
Microsoft InfoPath Form Template
12.9 KB

48. Click **Save**. DBXL will confirm the operation through a dialog box. Click **OK** to close it.

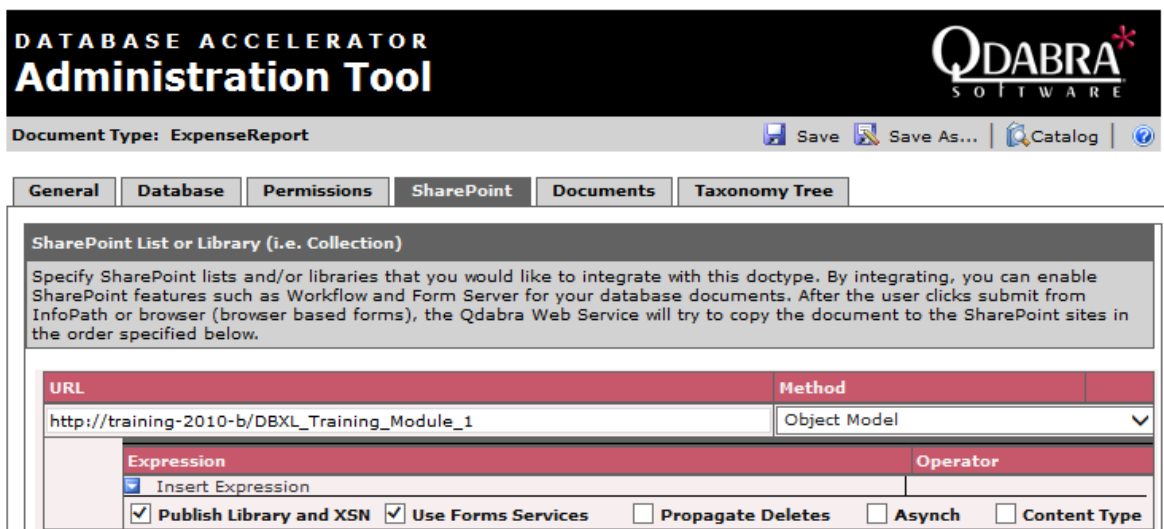
ADD A SHAREPOINT MAPPING

Next we'll add a SharePoint mapping so that users can interact with this form via a SharePoint form library.

49. Switch to the **SharePoint** tab.
50. Click **Insert Mapping**.
51. 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.

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



DATABASE ACCELERATOR Administration Tool

Document Type: ExpenseReport

Save Save As... Catalog

General Database Permissions **SharePoint** Documents Taxonomy Tree

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.

URL	Method
http://training-2010-b/DBXL_Training_Module_1	Object Model

Expression	Operator
☒ Publish Library and XSN ☒ Use Forms Services ☐ Propagate Deletes ☐ Asynch ☐ Content Type	

TEST THE SOLUTION!

55. Use Internet Explorer to navigate to the form library URL.

56. Click **Add Document**.

57. Fill out the form and submit.

The form library in Internet Explorer will refresh and you'll see the new document.

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

You can also check the Documents tab in DAT to verify that your new document is not stored in DBXL as well.

DATABASE ACCELERATOR Administration Tool


Document Type: ExpenseReport [Save](#) [Save As...](#) [Catalog](#) [?](#)

General
Database
Permissions
SharePoint
Documents
Taxonomy Tree

Export Documents

Import Documents

Query Documents

To limit the number of documents shown, enter a starting Doc. ID and the number of documents to show, and then click query. You can then jump forward or backward by the number of shown documents, or click Query All to show all documents. To search for a Document with a specific Ref. ID, type the ID into the field, and then click Query.

Starting Doc. ID: 227

Ref. ID: 1

Range: 20

[Previous](#)
[Next](#)
[Query](#)
[Query All](#)

If reshredding more than 100 documents, please use the DBXL Migration Tool

[Refresh](#)

Doc. ID	Ref. ID	Version #	Name	Author	Description	New	
227	1	1	12345	Ernesto	this is a test	Open	☐

Powered by:  Qdabra® Database Accelerator

Web Service URL: <http://TRAINING-2010-B/QdabraWebService/DbxlDocumentService.aspx>

DBXL Version: 2.8.2013.1202

Form Version: 2.8.0.6

User: ErnestoM

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English ▼

CONDITIONAL SHAREPOINT MAPPING

Now let's pretend we want to map forms only when a certain condition is satisfied.

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

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

URL	Method
http://qshp2010/ExpenseReport	Object Model

Expression

Insert Expression

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

☒ Insert Mapping

59. In the Expression field, enter

/my:expenseReport/my:items/my:total > 0

This means we only want to show Expense Reports where the total is non zero.

60. Click **Save**, and then **OK** in the confirmation dialog.

61. Switch to the Documents tab and click Reshred All. The existing document will now have this condition applied. You will no longer see this document in the SharePoint form library.

62. Back in Internet Explorer, click **Add Document**.

63. Fill out the form and submit. Make sure to satisfy the condition!

When the form submits and the form library refreshes, you'll notice that the form you just submitted shows up! This is because it satisfied the condition.

64. In DAT, switch to the Documents tab, to verify that the form you just submitted is listed.