

## MODULE 2: EVENT RECEIVER SCENARIO ON SHAREPOINT 2013

Using the Event Receiver, the InfoPath form does not need to be modified to include the data connection that submits to the DBXL Web Service. The InfoPath form template submits to a SharePoint form library, and the Event Receiver maps those forms to DBXL.

This scenario is most important for SharePoint 2013. Therefore, the tutorial in this document will focus on SharePoint 2013. However, the steps should be similar if working on SharePoint 2010. The Event Receiver has not been tested in SharePoint 2003 or 2007.

Contrary to the integrated scenario, DBXL does not need to be installed on the SharePoint site. In fact, DBXL can be installed on a different site or even a different server!

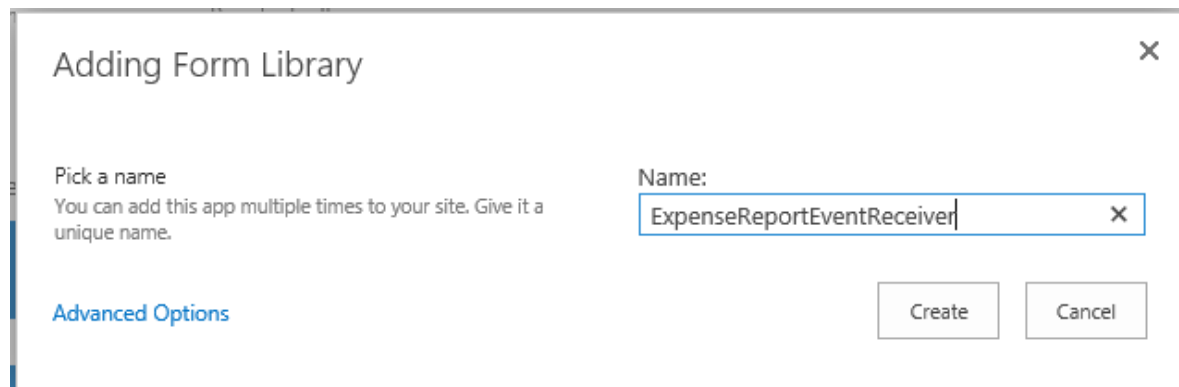
Here is an overview of this module:

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## SET UP THE FORM AND FORM LIBRARY

The basis for this scenario is that the form will submit directly to a form library. These steps will set this up.

1. Create a new form library. This can be accomplished by going to **Site Contents > add an app > Form Library**. Then provide a name for the form library and click **Create**.



2. Open the InfoPathExpenseReport.xsn form template in Design mode.
3. Go to **Data > Data Connections** and remove the **Main submit** data connection.
4. Click **Add > Submit Data** then click **Next**.
5. Select "To a document library on a SharePoint site" and click **Next**.
6. Enter the URL to the form library created earlier. For the **File name**, click **fx** to select the Expense Code node. Check "Allow overwrite if file exists".
7. Click **Next**, then click **Finish**, then click **Close**.
8. Click **File > Save** to save the form template.
9. Click **File > Publish > SharePoint server**. Walk through the InfoPath publishing wizard to publish the form to the form library created earlier.

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## CREATE THE DOCUMENT TYPE

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

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

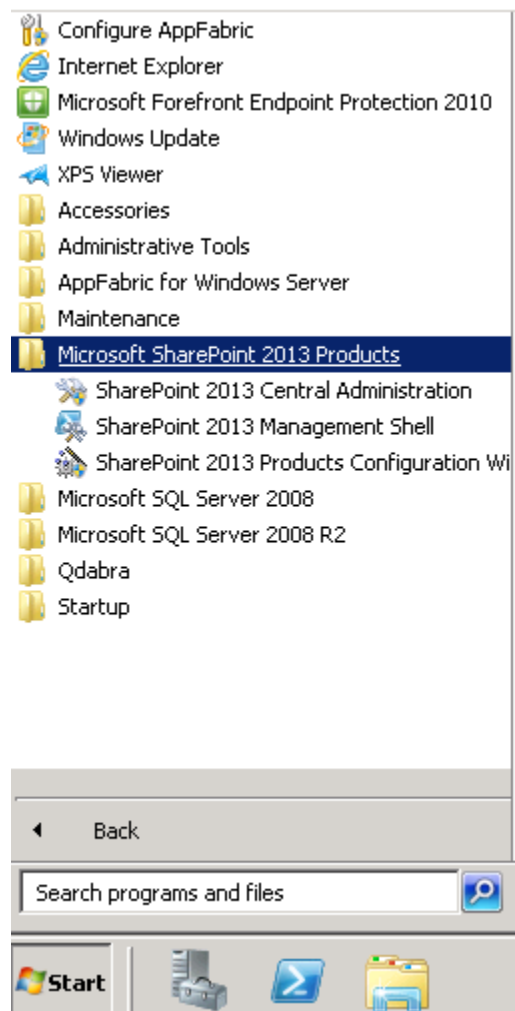
InfoPath will open the DBXL Administration Tool (DAT). Now you can create a new configuration in DAT.

12. In DAT, click on **New Configuration**.
13. Type **ExpenseReport** into the **Name** field.
14. Under **InfoPath Form Template**, click on **Click here to attach a file**.
15. Select the XSN saved in the previous section and click **Insert**.
16. Click **Save**. DBXL will confirm the operation through a dialog box. Click **OK** to close it.

## INSTALL THE EVENT RECEIVER

The following steps need to be executed on the server itself and require the [latest Event Receiver](#) WSP file.

17. Connect to the SharePoint server via Remote Desktop Connection.
18. [Download](#) the latest WSP and copy it into the server.
19. Go to the **Start Menu > All Programs > Microsoft SharePoint 2013 Products**.
20. Right click on **SharePoint 2013 Management Shell** and select **Run As Administrator**.



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21. Add the WSP file included in the package. This step requires that you provide the full path:

***Add-SPSolution C:\<path>\Qdabra.Dbxl.SharePoint.wsp***

22. Deploy the WSP file.

For SharePoint 2010, use:

***Install-SPSolution -Identity Qdabra.Dbxl.SharePoint.wsp -GACDeployment***

For SharePoint 2013, use:

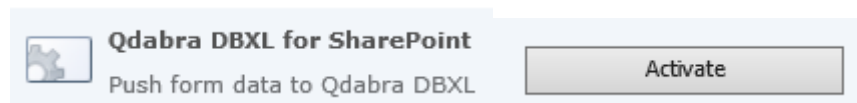
***Install-SPSolution -Identity Qdabra.Dbxl.SharePoint.wsp -GACDeployment -CompatibilityLevel All***

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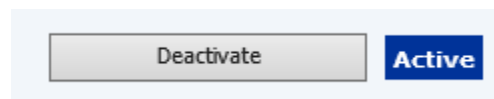
## ACTIVATE THE EVENT RECEIVER ON THE SITE

These steps can be executed from a client machine, by a user who is a site collection administrator.

23. Use Internet Explorer to navigate to the SharePoint site where your form library is located, and access **Site Actions > Site Settings**.
24. Under **Site Collection Administration**, click on **Site collection features** or **Site features** ([http://<servername> /<site>/\\_layouts/ManageFeatures.aspx](http://<servername> /<site>/_layouts/ManageFeatures.aspx)).
25. Find “Qdabra DBXL for SharePoint” and click **Activate**.



Once activated, the available buttons will change to:

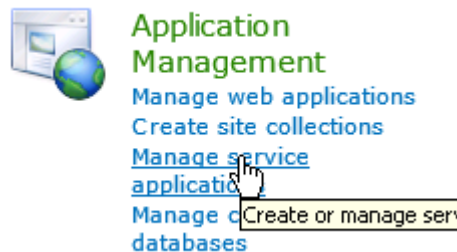


This step needs to be executed on every SharePoint site where the Event Receiver will be used.

## CREATE THE SSO APP ID

To create the Secure Store Application ID, the user must have access to SharePoint Central Administration.

26. Go to SharePoint Central Admin then click on **Manage Service Applications**.



27. Click on **Secure Store Service Application**.

28. If accessing for the first time, click on 'Generate New Key' on the ribbon and enter pass phrase as you like. If not accessing for the first time, click **Manage** in the ribbon.

29. Click **New** on the ribbon.

30. Enter the required values for the target application settings. Click **Next**.

| Target Application Settings                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>The Secure Store Target Application ID is a unique identifier. You cannot change this property after you create the Target Application.</p> <p>The display name is used for display purposes only.</p> <p>The contact e-mail should be a valid e-mail address of the primary contact for this Target Application.</p> <p>The Target Application page URL can be used to set the values for the credential fields for the Target Application by individual users.</p> <p>The Target Application type determines whether this application uses a group mapping or individual mapping. Ticketing indicates whether tickets are used for this Target Application. You cannot change this property after you create the Target Application.</p> | <p>Target Application ID<br/> <input type="text" value="DBXL"/></p> <p>Display Name<br/> <input type="text" value="DBXL"/></p> <p>Contact E-mail<br/> <input type="text" value="jim.cantwell@qdabra.com"/></p> <p>Target Application Type<br/> <input type="button" value="Group"/></p> <p>Target Application Page URL<br/> <input type="radio"/> Use default page<br/> <input type="radio"/> Use custom page<br/> <input type="text"/><br/> <input checked="" type="radio"/> None</p> |

31. Use the default (Windows Username and Windows Password). Click **Next**.

32. Specify the Administrator for the target application. You can specify Members for the target application as well if you like to. Click **Ok**.

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|                                                                                                                                                                              |                                                                                                                                                                                                              |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Target Application Administrators</b><br>The list of users who have access to manage the Target Application settings. The farm administrator will have access by default. | <div>Ernesto Machado (Test) ; Jim Cantwell ; Jim Cantwell (QDABRA) ;</div> <div>Users who have Full Control or All Target Applications privileges can administer this Secure Store Target Application.</div> |
| <b>Members</b><br>The users and groups that are mapped to the credentials defined for this Target Application.                                                               | <div>All Authenticated Users ;</div>                                                                                                                                                                         |

OK Cancel

33. Select the new AppID and click **Set Credentials**.

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## FORM LIBRARY SETTINGS

**Read / Contribute** permissions to the form library are not enough to access the Form Library settings, and therefore not enough to set up this feature. **Design** is the minimum permission level required. **Full Control** would also be appropriate.

34. Go to **Form Library > Library Settings**. Under **General Settings**, find **DBXL Settings**.
35. Fill out the fields on this page. See the table below for details on each of the available settings.
36. Click **Save & Test** to test your settings.
37. Click **OK** to save the settings.
38. If you have existing forms in this form library, you can click **Synchronize** on the DBXL Settings page to “push” the data to DBXL.

That’s it! Now you can submit forms to the form library and the forms will show up in the Documents tab of your document type in the DBXL Admin Tool.

| DBXL Service                        |                                                                                                                                                                                                                                                                                                                                                                                                                                        |
|-------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>DBXL URL</b>                     | The URL to DBXL (QdabraWebService) on your server.<br>Example: <i>http://sharepoint.domain.com/QdabraWebService</i>                                                                                                                                                                                                                                                                                                                    |
| <b>DocumentType Name</b>            | The name of the Document Type in the DBXL Admin Tool.<br>Example: <i>QdExpenseReport-Sample</i>                                                                                                                                                                                                                                                                                                                                        |
| <b>Conditional Submit</b>           | An expression that defines which documents will be submitted to DBXL.<br>Examples:<br><i>/my:expenseReport/my:employee/my:name = "Ernesto"</i><br><i>/my:expenseReport/my:reportDate = '2012-08-22'</i><br><i>/my:expenseReport/my:items/my:total &gt; 10</i><br>Note that date comparisons are not supported:<br><i>/my:expenseReport/my:reportDate &gt; 2013-01-01</i><br><i>substring(/my:expenseReport/my:reportDate) = "2013"</i> |
| Document Settings                   |                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>Name xpath (optional)</b>        | The xpath in the InfoPath Form Template (XSN) that will be used for the DBXL::Name Property in the DBXL Admin Tool. Note that this xpath is not validated by the webpage.<br>Example: <i>/my:myFields/my:CustomerName</i>                                                                                                                                                                                                              |
| <b>Author xpath (optional)</b>      | The xpath in the InfoPath Form Template (XSN) that will be used for the DBXL::Author Property in the DBXL Admin Tool.                                                                                                                                                                                                                                                                                                                  |
| <b>Description xpath (optional)</b> | The xpath in the InfoPath Form Template (XSN) that will be used for the DBXL::Description Property in the DBXL Admin Tool.                                                                                                                                                                                                                                                                                                             |
| Credentials                         |                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>Secure Store Application ID</b>  | Created in a previous task.                                                                                                                                                                                                                                                                                                                                                                                                            |
| Notifications                       |                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>Email notifications to</b>       | Use the Person/Group Picker to select the user or users that will receive an email notification whenever there is an error when submitting data to DBXL.                                                                                                                                                                                                                                                                               |
| Enable DBXL Submit                  |                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>Enable DBXL submit</b>           | Enable (or disable) submitting to DBXL by checking (or unchecking) this checkbox.                                                                                                                                                                                                                                                                                                                                                      |
| Buttons                             |                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>Synchronize</b>                  | Click this button to "push" the latest SharePoint Form Library data to DBXL. Clicking Synchronize DOES NOT test the current settings and DOES NOT save any changes made to the settings.                                                                                                                                                                                                                                               |
| <b>Save &amp; Test</b>              | Click this button to test and save the current settings.                                                                                                                                                                                                                                                                                                                                                                               |
| <b>Ok</b>                           | Click this button to save and return to the Form Library Settings page. This button DOES NOT test the current settings.                                                                                                                                                                                                                                                                                                                |
| <b>Cancel</b>                       | Click this button to cancel and return to the Form Library Settings page.                                                                                                                                                                                                                                                                                                                                                              |