



Submit to DBXL anonymously from SharePoint

Using DBXL you can allow users to submit data from an anonymous SharePoint site. Please refer to the [DBXL Deployment Guide](#) for information about other scenarios.

This tutorial uses the Expense Report sample form template that is included in all InfoPath 2007 installations. Although the Expense Report sample form was designed for InfoPath 2007 it will work with later versions of InfoPath.

CONTENTS

Make sure you're a DBXL Administrator	2
Server changes.....	3
Security	6
Add the site to Local Intranet	6
Setup the SubmitDocument data connection	7
Convert SUBmitDocument to UDC	10
Set up the DBXL Document Type.....	11
Publish the Form to the SharePoint Form Library	12



MAKE SURE YOU'RE A DBXL ADMINISTRATOR

To successfully complete the steps in this document, 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. Use Remote Desktop to connect to the machine where DBXL is installed.
2. Check the DBXL web.config file.
 - a. In the **Qdabrawebservice** folder, find the **web.config** file. The QdabraWebService folder is located, usually, in your SharePoint-80 site. For example:
C:\inetpub\wwwroot\wss\VirtualDirectories\80\QdabraWebService
 - b. Open the **web.config** file in a text editor, such as **Notepad**.
 - c. Search 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" />
```

Each of these keys is assigned a value (a group). During installation, DBXL creates a group called **DBXLAdmins** on the server. This group, by default, is assigned to both keys: **AdminGroupAlias** and **DbxlAdminAlias**.

3. To add a DBXL Administrator all you need to do is add users to the **DbxlAdmins** group.
 - a. Open **Computer Management**.
 - b. Under **System Tools > Local Users and Groups**, locate the **DbxlAdmins** group. Right-click to see its **Properties**.
 - c. Add yourself to this group.

Leave the Remote Desktop Connection open. We will use it later.



SERVER CHANGES

The assumption is that your SharePoint environment has already been set up to allow anonymous users. The exact steps will vary according to your version of SharePoint.

4. This scenario will require a domain account that can be used to connect SharePoint and DBXL. Please create such an account; for this tutorial, we're using an account called `<domain>_dbxluser`.

5. Search for the key for AnonymousUser. Set the value equal to the user you've created.

```
<add key="AnonymousUser" value="AUTONOMYSYSTEMS\_dbxluser" />
```

6. Near the end of web.config, find the following text:

```
<!-- To allow anonymous access, uncomment out the location entries below and set  
the AnonymousUser account in the <appSettings> section -->
```

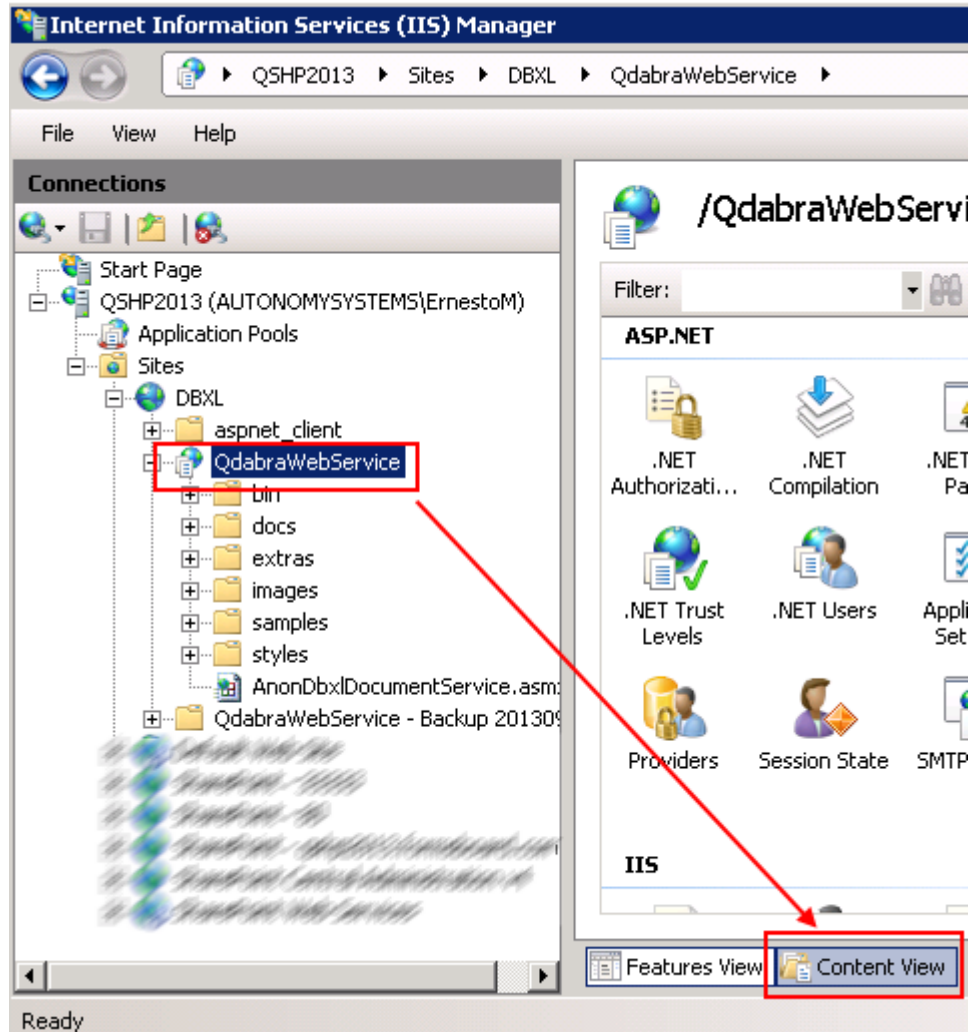
7. Uncomment the section below this text.

8. Save and close the web.config file.

9. Go to IIS Manager (still on the server where DBXL is installed).

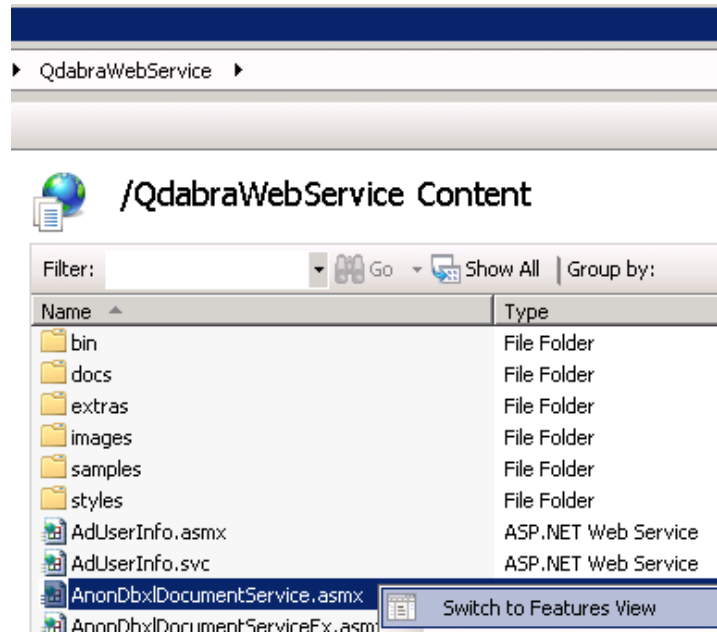
10. Select the QdabraWebService site and then click **Content View** in the middle panel.





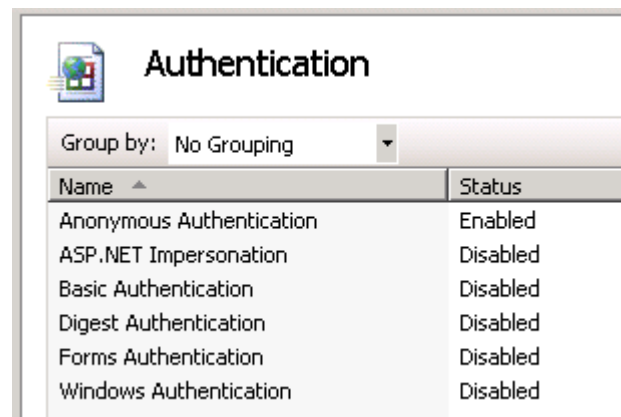
11. Right click on the AnonDbxlDocumentServiceEx.asmx and select **Switch to Features View**.





12. The AnonDbxlDocumentService.asmx is now selected on the panel on the left. In the middle panel, double click on **Authentication**.

13. Enable **Anonymous Authentication** and disable **Windows Authentication**.



14. Select AnonDbxlDocumentServiceEx.asmx on the panel on the left. In the middle panel, double click on **Authorization Rules**.

15. Remove any rules that exist already.

16. Add a rule that allows anonymous users.



SECURITY

When allowing anonymous access, it is recommended that you secure the DBXL web service to only accept connections from specific locations. IIS allows restriction by IP using the <ipSecurity> element of the web.config. This can be used to restrict submissions to just the SharePoint servers where the form is hosted.

Example web.config restriction by IP:

```
<location path="AnonDbxlDocumentServiceEx.aspx">
  <system.webServer>
    <security>
      <ipSecurity>
        <add ipAddress="192.168.100.1" />
        <add ipAddress="169.254.0.0" subnetMask="255.255.0.0" />
      </ipSecurity>
    </security>
  </system.webServer>
</location>
```

Reference: <http://www.iis.net/configreference/system.webserver/security/ipsecurity>

ADD THE SITE TO LOCAL INTRANET

Before we continue, we will add the server to Internet Explorer's Local Intranet zone.



<http://www.qdabra.com>

Last updated on 6/27/2014 5:01 PM

Copyright © 2013 Autonomy Systems, LLC. All rights reserved.

17. In Internet Explorer, go to **Internet Options**, switch to the **Security** tab, select **Local intranet** and then click **Sites**.
18. In the **Local intranet** window, click **Advanced**.
19. Enter the site where DBXL is installed (e.g. `http://<servername>/`) and then click **Add**.

The site should now be listed amongst the local intranet websites.

20. Click **Close**, and then click **OK** twice to close all the dialogs.

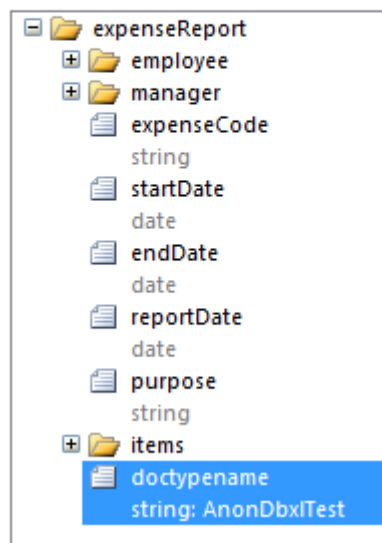
SETUP THE SUBMITDOCUMENT DATA CONNECTION

21. Open your InfoPath form template (XSN) in design mode.
22. Add a node to the form's schema and call it `doctypeName`. Give it a default value equal to the name of the document type (which will be created in DBXL in an upcoming step).

Fields

Drag a field to add it to the form.

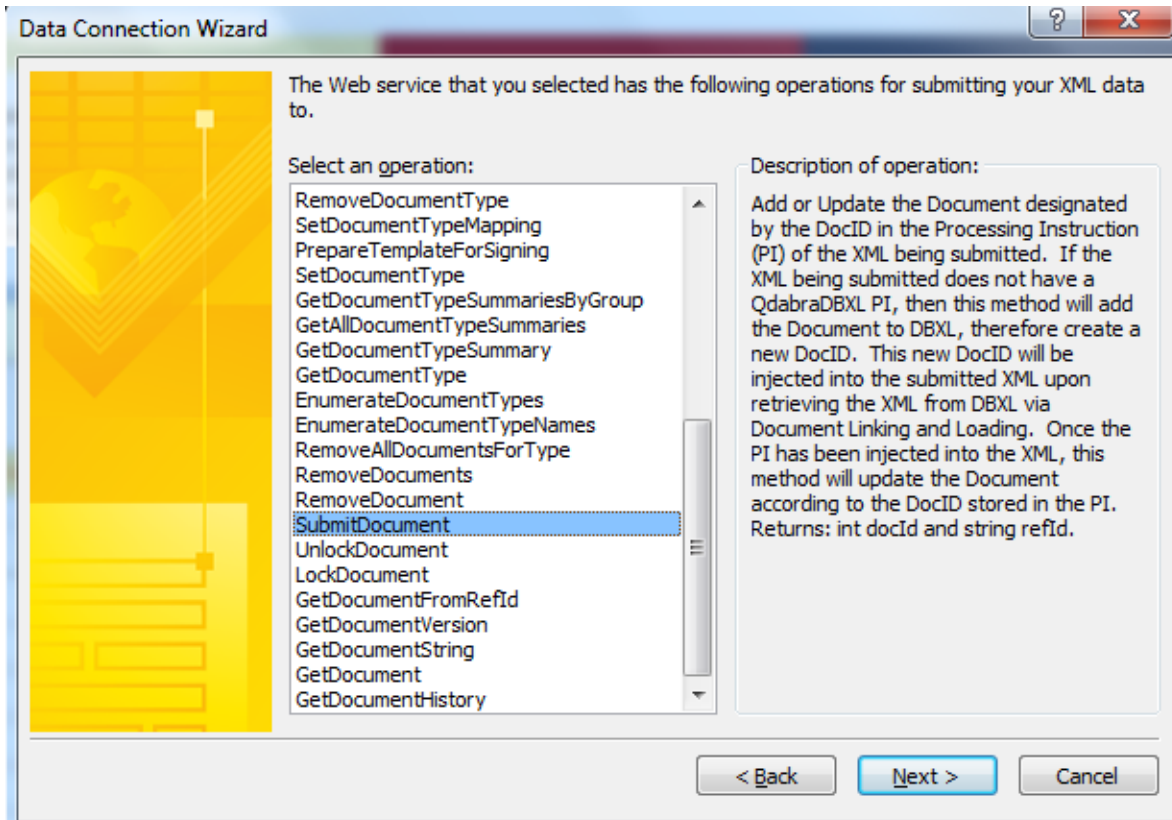
Fields:



23. Switch to the **Data** tab and click **Data Connections**.
24. 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.



25. Now click on **Add**. This will load the Data Connection Wizard.
26. Select **Submit data** and click **Next**, then select **“To a web service”** and click **Next**.
27. In the web service field, enter
<http://<yourservname>/qdabrawebsevice/AnonDbxlDocumentServiceEx.asmx> and click **Next**.
28. Select **SubmitDocument** and click **Next**.



29. For the docTypeName parameter, select the my:doctypeName node added earlier and make sure to check **“Submit data as string”**.



Data Connection Wizard ? X


The submit operation for the Web service requires the following parameters. Specify which fields or groups in your form provide the data for these parameters. If the Web service parameter requires an entire XML document, you can specify that as well.


Parameters:

Parameter	Type	Element
tns:doTypeName	string	/my:expenseReport/my:doctypeName
tns:xml	string	
tns:name	string	
tns:author	string	

Parameter options

Submit the following data for the selected parameter:

Field or group: 

Include: 

Entire form (XML document, including processing instructions)

Submit data as a string

Note: Digitally signed data must be submitted as a string to preserve white spaces.

30. For the xml parameter, select “Entire form” and also check “Submit data as a string”.



Data Connection Wizard ? ✕

The submit operation for the Web service requires the following parameters. Specify which fields or groups in your form provide the data for these parameters. If the Web service parameter requires an entire XML document, you can specify that as well.

Parameters:

Parameter	Type	Element
tns:docTypeName	string	/my:expenseReport/my:doctypename
tns:xml	string	/
tns:name	string	
tns:author	string	

Parameter options

Submit the following data for the selected parameter:

Field or group:

Include:

Entire form (XML document, including processing instructions)

Submit data as a string

Note: Digitally signed data must be submitted as a string to preserve white spaces.

31. Finish the data connection wizard.
32. Find the **Submit** button at the bottom of the form. Configure it so it submits to this new data connection.
33. Save the updated form by selecting **File > Save**.

CONVERT SUBMITDOCUMENT TO UDC

34. In your SharePoint site, create a Data Connections library (if one does not already exist). Make sure that the anonymous users will have read access to the Data Connections library.
35. In InfoPath designer, go to **Data > Data Connections**.
36. Select the SubmitDocument data connection and click "Convert to connection file".
37. Enter the URL for the new UDC file in this format:
http://<servername>/Data%20Connections/<connectionName>.udcx, and click **OK**.



<http://www.qdabra.com>

Last updated on 6/27/2014 5:01 PM

Copyright © 2013 Autonomy Systems, LLC. All rights reserved.

38. Save the form template.

SET UP THE DBXL DOCUMENT TYPE

39. Using Internet Explorer, go to <http://<servername>/QdabraWebService/>.

40. Click on the first link, **DBXL Administration Tool**, to launch DAT.



41. Once DAT opens in InfoPath, click **New Configuration**.

42. In the **General** tab, enter a name under **Document Type Details > Name**, and attach the XSN form template. **You must use the same name used earlier in this document.**

43. Click **Save** and then click **OK** in the confirmation dialog.

44. Switch to the **Permissions** tab.

45. Check the checkbox for “Enforce Permissions”, and give the DbxlUser Document Type permissions.

General	Database	Permissions	SharePoint	Documents	Taxonomy Tree			
<input checked="" type="checkbox"/> Enforce Permissions								
Document Type Level Permissions								
At least one role must be given Admin permission at the document type level. Otherwise a global DBXL admin is required to edit the document type. Only one user should be configured per row. Do not list users delimited with semicolons.								
Name	Role Name	Add	Read	Write	L-Read	L-Write	Del	Admin
me	AUTONOMYSYSTEMS_dbxluser	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Insert document type level permissions								



<http://www.qdabra.com>

Last updated on 6/27/2014 5:01 PM

Copyright © 2013 Autonomy Systems, LLC. All rights reserved.

46. Save the document type.

PUBLISH THE FORM TO THE SHAREPOINT FORM LIBRARY

47. Click **File > Publish > SharePoint server**.

48. Walk through the InfoPath publishing wizard to publish the form to the form library.

The anonymous users are not going to see the “Add Document” link in the SharePoint form library, so you’ll need to provide a link somewhere so they can open the form. However, your scenario is not set up: when this form is submitted, the data will be sent to DBXL!

