

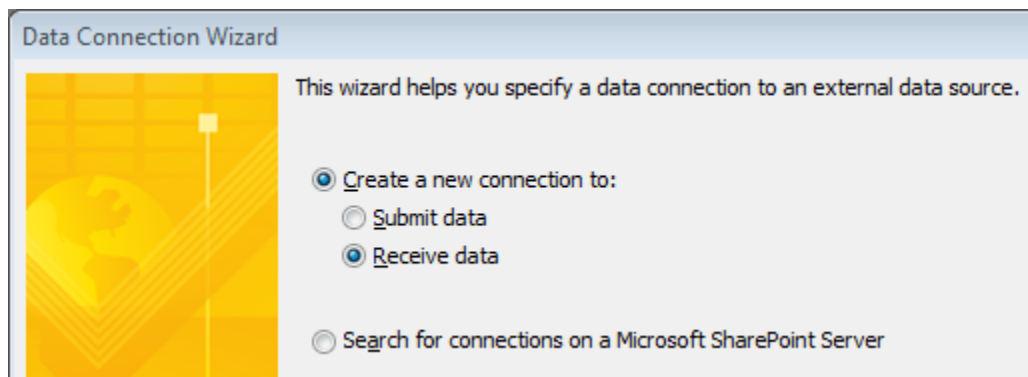
## QUERY DATA FROM ACTIVE DIRECTORY

Active Directory includes a wealth of information about your company's organization. This task will show you how to auto populate fields in your InfoPath form with the email address and full name of the currently logged on user.

### CREATE THE DATA CONNECTION

First we need to create a data connection to the Active Directory web service.

1. Open the Expense Report form template that we have been working with in previous labs. To do this, right click on the Expense Report sample XSN on your local drive, and select **Design**.
2. In the InfoPath 2010 ribbon, select **Data** and then click on **Data Connections**.
3. Click **Add**.
4. Select the radio button to **Create a New Connection to** and **Receive Data**. Click **Next**.



5. Select the radio button for **SOAP Web Service** and then click **Next**.
6. Enter the URL of the service: **http://<yourservername>/QdabraWebService/ADUserInfo.asmx**. Click **Next**.
7. Select the operation (Web Method) named **GetMyInfo**. Click **Next**.
8. Click **Next**. There is no need to check the checkbox of **Store a copy of the data in the form template**.

Qdabra DBXL Training: Module 4

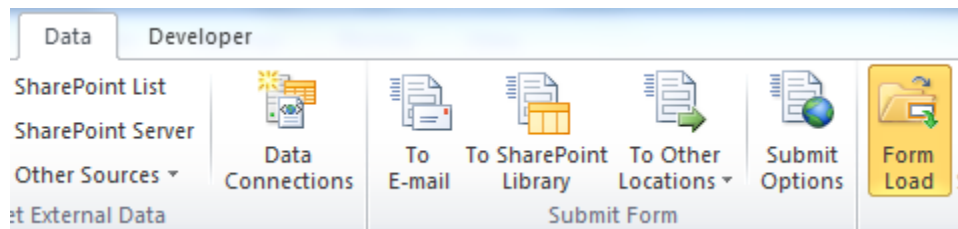
9. Uncheck the **Automatically retrieve data when form is opened** checkbox, click **Finish**, and then click **Close**.

---

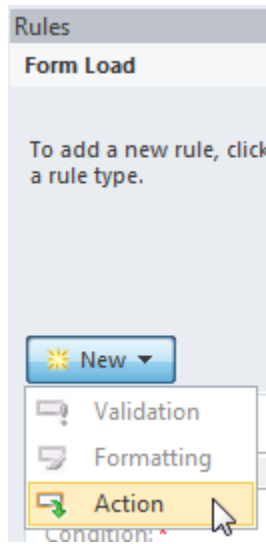
USE THE ACTIVE DIRECTORY DATA TO OBTAIN EMPLOYEE INFO

Now you will change the **Employee Email** and **Name** fields to auto-populate.

10. In the Data tab of InfoPath 2010, click **Form Load**.



11. Click **New** and select **Action**.



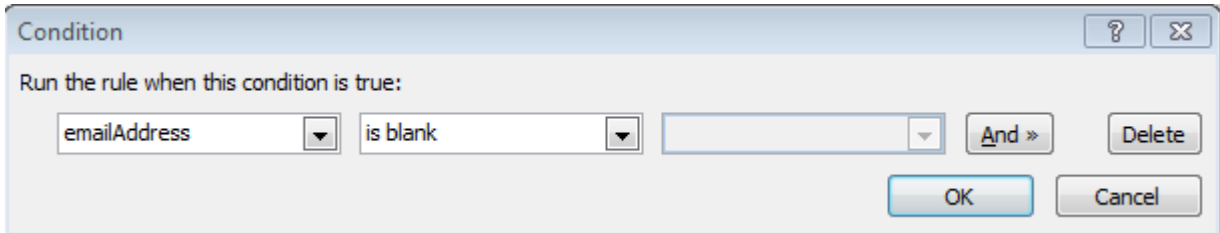
12. Click the blue text under **Condition**.



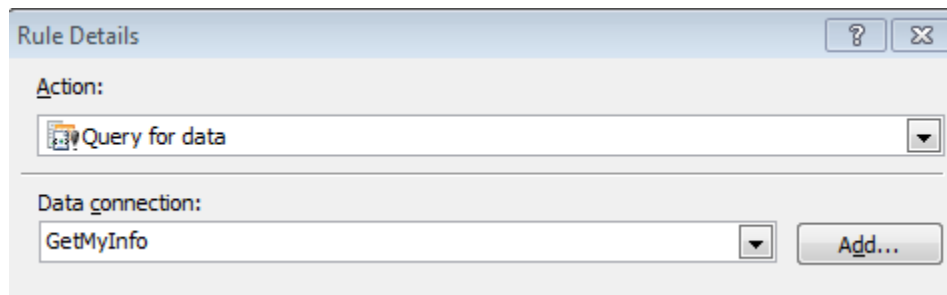
We will enter a condition because we only want to load this data once, when the form is first created.

Qdabra DBXL Training: Module 4

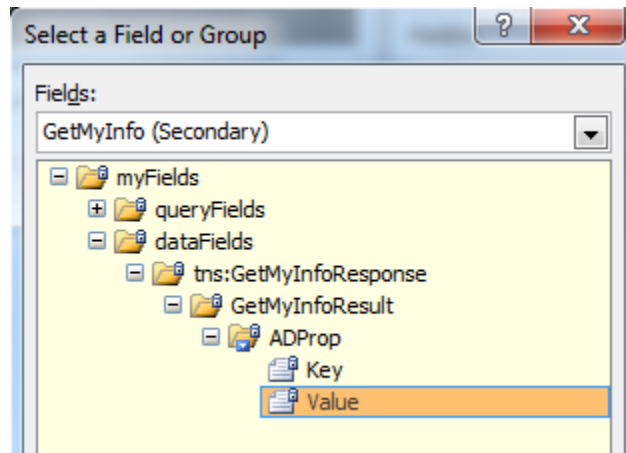
13. Select “**Select a field or group**” from the first dropdown and select the **emailAddress** under the **Employee** node. In the middle dropdown, select “**Is blank**”. The condition should look as shown below. Click **OK**.



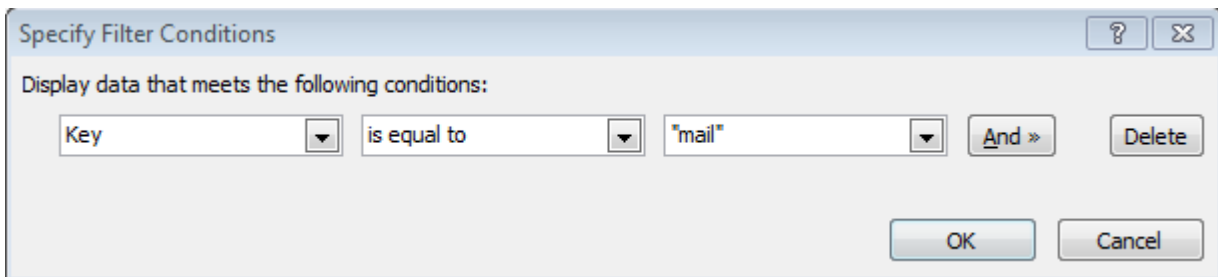
14. Next to “**Run these actions**”, click **Add** and select “**Query for data**”.
15. Select the **GetMyInfo** data connection and click **OK**.



16. Next to “**Run these actions**”, click **Add** and select “**Set a field’s value**”.
17. Click the icon to the right of “**Field**” and select the **emailAddress** node under the **Employee** node.
18. Click the icon to the right of “**Value**” and click **Insert field or Group**.
19. Use the dropdown to switch to the **GetMyInfo** secondary data connection.



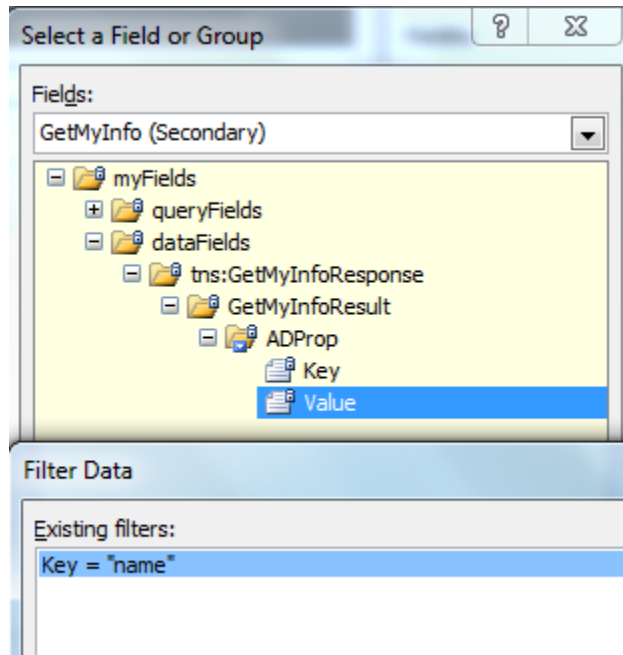
20. Expand the **datafields** node, select the **Value** node, and click **Filter Data**.
21. Click **Add**. We need to add a filter because the Active Directory web service returns multiple keys and their values. At this point, we want only the email.
22. Select **Key** in the first dropdown and **"is equal to"** in the middle dropdown. In the third dropdown, select **Type text** and type in **"mail"** (no quotes).



23. Click OK until all dialogs are closed.
24. Now we'll set the employee name field. Next to **"Run these actions"**, click **Add** and select **"Set a field's value"**.
25. Click the icon to the right of **"Field"** and select the **name** field under the **Employee** node.
26. Click the icon to the right of **"Value"** and click **Insert field or Group**.
27. Use the dropdown to switch to the **GetMyInfo** secondary data connection.
28. Expand the **dataFields** node, select the **Value** node, and click **Filter Data**.

Qdabra DBXL Training: Module 4

29. Click **Add**. We need to add a filter because the Active Directory web service returns multiple keys and their values. At this point, we want only the name.
30. Select **Key** in the first dropdown and “**is equal to**” in the middle dropdown. In the third dropdown, select **Type text** and type in “**name**” (no quotes).



31. Click **OK** until all dialogs are closed.
32. Switch to the **Home** tab in the InfoPath 2010 ribbon and click **Preview**. You will see the current user's data:



**EXPENSE REPORT**

Report Date: 2/27/2011  Expense Code:

Business Purpose:

---

**Employee Information**

Name: Ernesto Machado

Department:

E-mail Address: Ernesto.Machado@qdabra.com

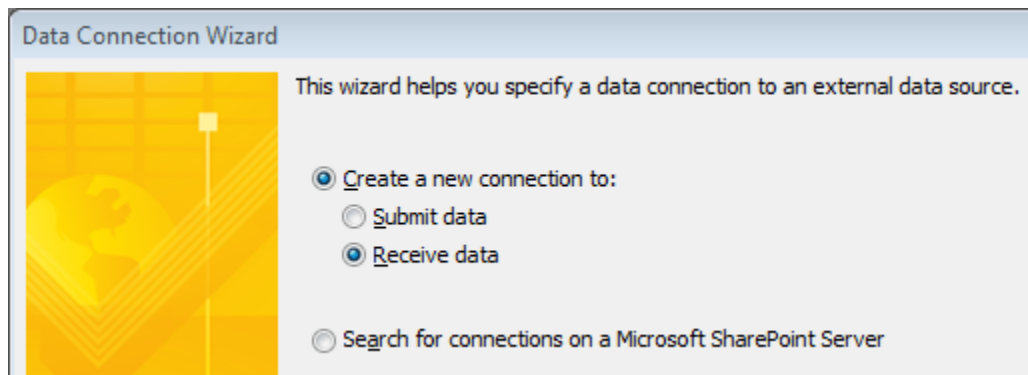
33. Click on **Close Preview**.

---

#### CREATE A SECOND DATA CONNECTION

Now we need to create a data connection to the Active Directory web service so that the form can obtain the manager for the current user.

- 34. In the InfoPath 2010 ribbon, select **Data** and then click on **Data Connections**.
- 35. Click **Add**.
- 36. Select the radio button to **Create a New Connection to and Receive Data**. Click **Next**.



**Data Connection Wizard**

This wizard helps you specify a data connection to an external data source.

- Create a new connection to:
  - Submit data
  - Receive data
- Search for connections on a Microsoft SharePoint Server

Qdabra DBXL Training: Module 4

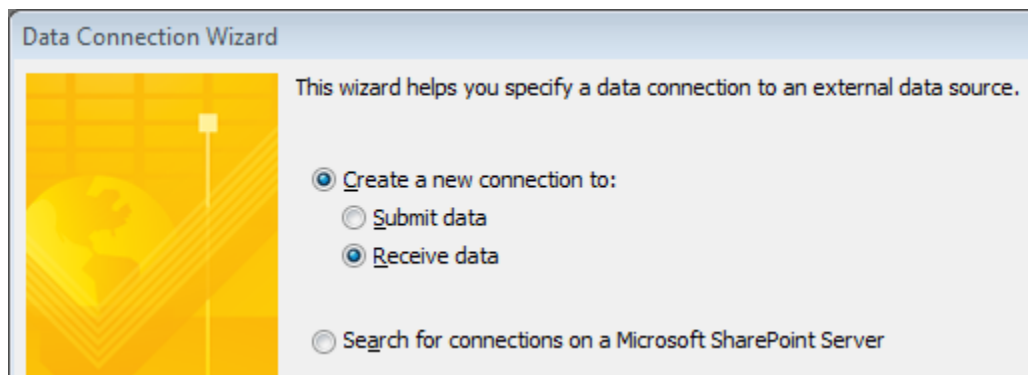
37. Select the radio button for **SOAP Web Service** and then click **Next**.
38. Enter the URL of the service: **http://<yourservname>/QdabraWebService/ADUserInfo.asmx**. Click **Next**.
39. Select the operation (Web Method) named **GetManagerAlias**. Click **Next**.
40. Click **Next**. There is no need to check the checkbox of **Store a copy of the data in the form template**.
41. Uncheck the **Automatically retrieve data when form is opened** checkbox, click **Finish**, and then click **Close**.

---

### CREATE A THIRD DATA CONNECTION

Now we need to create a data connection to the Active Directory web service so that the form can obtain the manager's data.

42. In the InfoPath 2010 ribbon, select **Data** and then click on **Data Connections**.
43. Click **Add**.
44. Select the radio button to **Create a New Connection to** and **Receive Data**. Click **Next**.



45. Select the radio button for **SOAP Web Service** and then click **Next**.
46. Enter the URL of the service: **http://<yourservname>/QdabraWebService/ADUserInfo.asmx**. Click **Next**.
47. Select the operation (Web Method) named **GetUserInfo**. Click **Next**.
48. Click **Next**. There is no need to check the checkbox of **Store a copy of the data in the form template**.

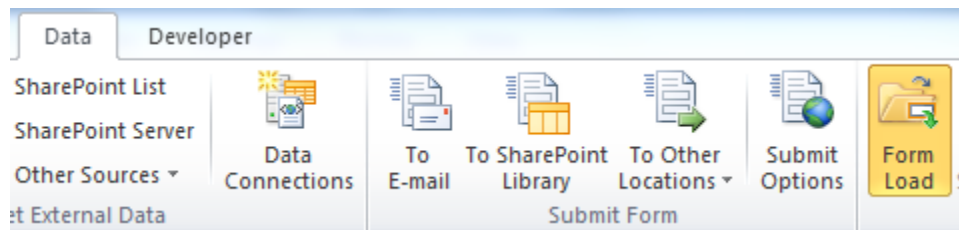
Qdabra DBXL Training: Module 4

- Uncheck the **Automatically retrieve data when form is opened** checkbox, click **Finish**, and then click **Close**.

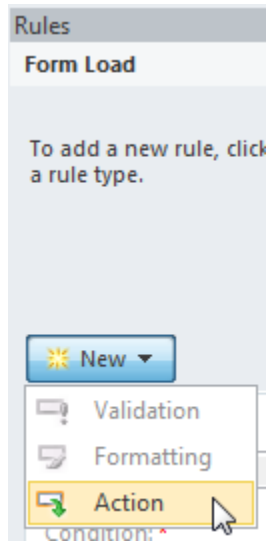
USE THE ACTIVE DIRECTORY DATA TO OBTAIN EMPLOYEE INFO

Now that all the data connections are ready, we can set up the form logic that will auto-populate the **Manager Email** and **Name**.

- In the Data tab of InfoPath 2010, click **Form Load**.



- Click **New** and select **Action**.



- Click the blue text under **Condition**.

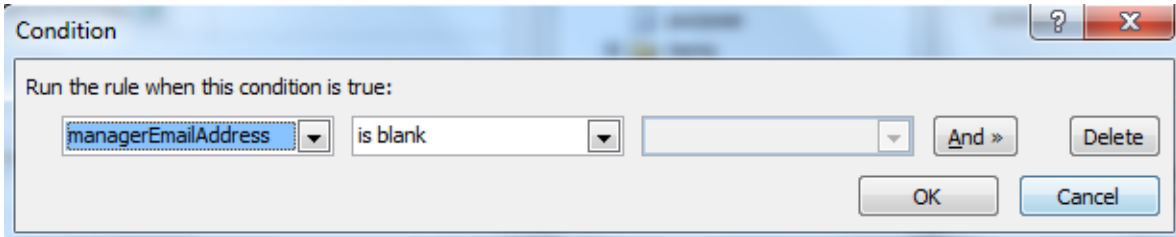


We will enter a condition because we only want to load this data once, when the form is first created.

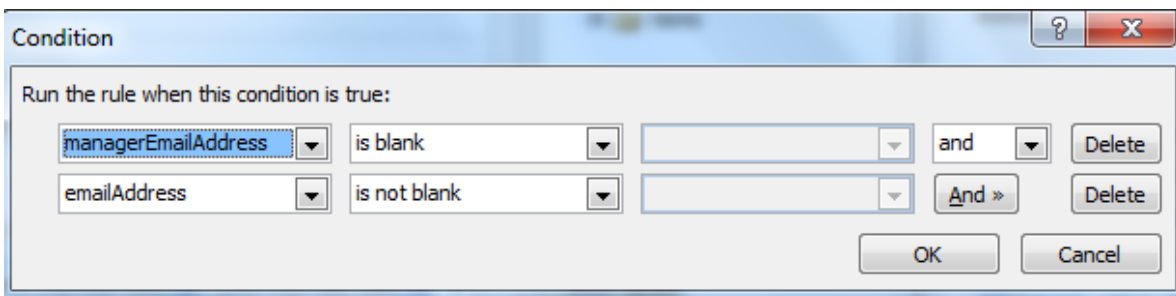


Qdabra DBXL Training: Module 4

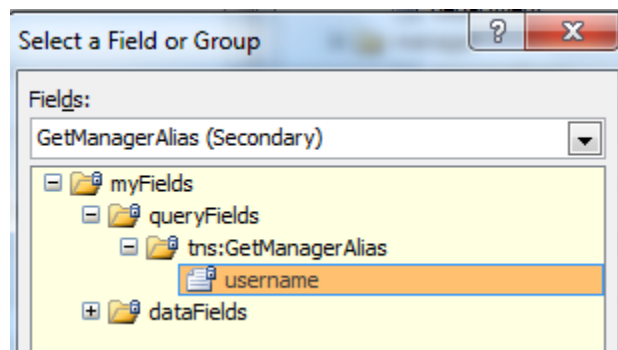
53. Select “**Select a field or group**” from the first dropdown and select the **managerEmailAddress** under the **Manager** node. In the middle dropdown, select “**Is blank**”. The condition should look as shown below.



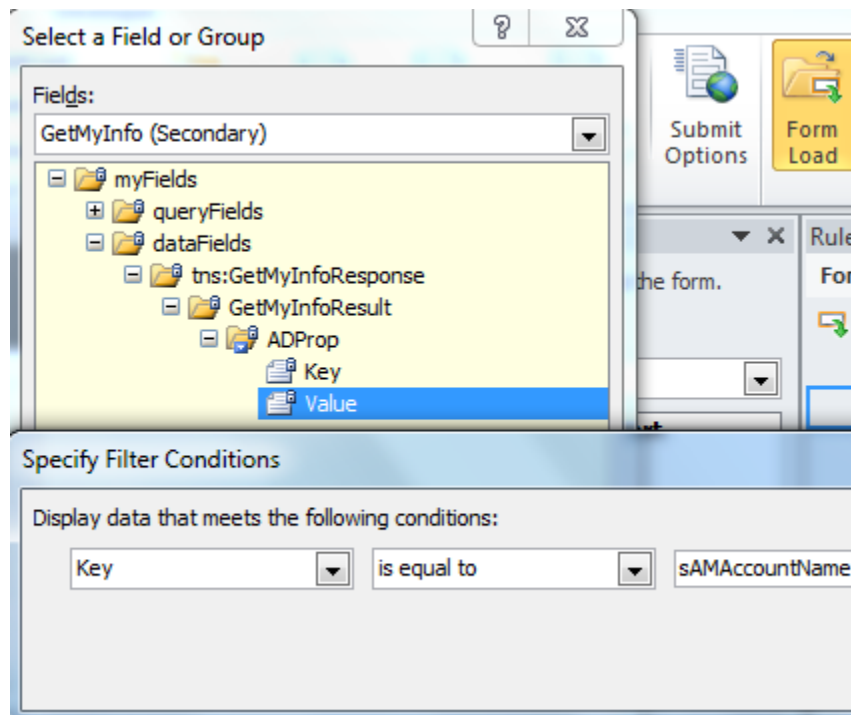
54. Add a second condition, because the rule can only execute when the current user’s alias has been detected. Click **And**.
55. Select “**Select a field or group**” from the first dropdown and select the **emailAddress** under the **Employee** node. In the middle dropdown, select “**Is not blank**”. Click **OK**.



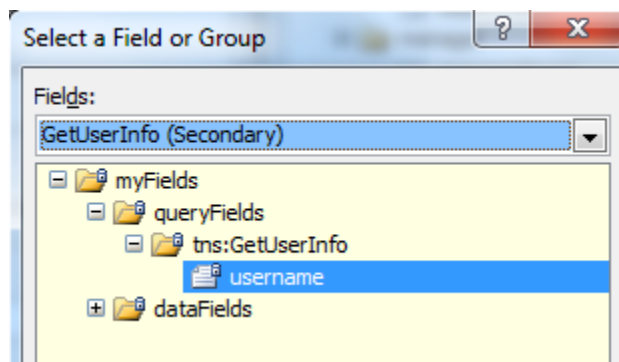
56. Next to “**Run these actions**”, click **Add** and select **Set a field’s value**.
57. For **Field**, select the username node in the **GetManagerAlias** data connection.



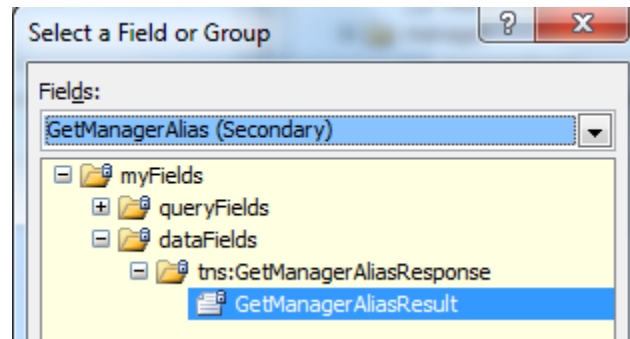
58. For **Value**, select the **Value** node from the **GetMyInfo** data connection, but add a **Filter**, such that **Key** equals **sAMAccountName**.



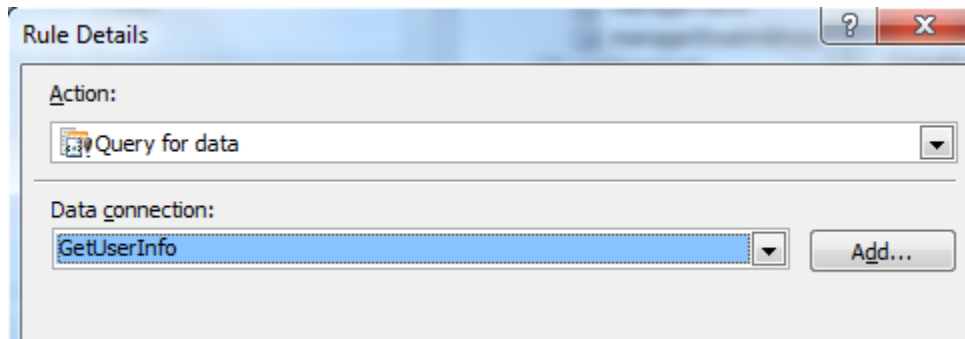
59. Next to “**Run these actions**”, click **Add** and select “**Query for data**”.
60. Select the **GetManagerAlias** data connection and click **OK**.
61. Next to “**Run these actions**”, click **Add** and select **Set a field’s value**.
62. For the **Field**, select the username field in the **GetUserInfo** data connection.



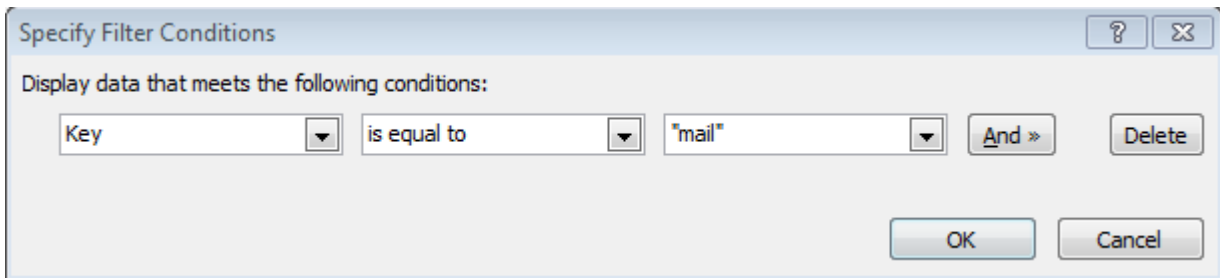
63. For the **Value**, select the **GetManagerAliasResult** node in the **GetManagerAlias** data connection.



64. Next to “**Run these actions**”, click **Add** and select “**Query for data**”.
65. Select the **GetUserInfo** data connection.



66. Next to “**Run these actions**”, click **Add** and select “**Set a field’s value**”.
67. Click the icon to the right of “**Field**” and select the **managerEmailAddress** node under the **Manager** node.
68. Click the icon to the right of “**Value**” and click **Insert field or Group**.
69. Use the dropdown to switch to the **GetUserInfo** secondary data connection.
70. Expand the **datafields** node, select the **Value** node, and click **Filter Data**.
71. Click **Add**.
72. Select **Key** in the first dropdown and “**is equal to**” in the middle dropdown. In the third dropdown, select **Type text** and type in “**mail**” (no quotes).



73. Click **OK** until all dialogs are closed.
74. Now we'll set the managerName field. Next to **"Run these actions"**, click **Add** and select **"Set a field's value"**.
75. Click the icon to the right of **"Field"** and select the **ManagerName** field under the **Manager** node.
76. Click the icon to the right of **"Value"** and click **Insert field or Group**.
77. Use the dropdown to switch to the **GetUserInfo** secondary data connection.
78. Expand the **dataFields** node, select the **Value** node, and click **Filter Data**.
79. Click **Add**.
80. Select **Key** in the first dropdown and **"is equal to"** in the middle dropdown. In the third dropdown, select **Type text** and type in **"name"** (no quotes).
81. Click **OK** until all dialogs are closed.
82. Switch to the **Home** tab in the InfoPath 2010 ribbon and click **Preview**. You will see the current user's data, as well as the manager's data.

**EXPENSE REPORT**

Report Date: <input type="text" value="3/19/2012"/>	Expense Code: <input type="text"/>	Start Date: <input type="text"/>	End Date: <input type="text"/>
Business Purpose: <input style="height: 20px;" type="text"/>			

### Employee Information

Name: <input type="text" value="Ernesto Machado"/>	Title: <input type="text"/>
Department: <input type="text"/>	ID Number: <input type="text"/>
E-mail Address: <input type="text" value="Ernesto.Machado@qdabra.com"/>	

### Manager Information

Name: <input type="text" value="Patrick Halstead"/>	E-mail Address: <input type="text" value="Patrick.Halstead@Qdabra.com"/>
--	---

83. Click on **Close Preview**.

84. Optionally, you can right click on each of the four fields that are now being set automatically, and make these read-only, such that the user cannot modify their values.

