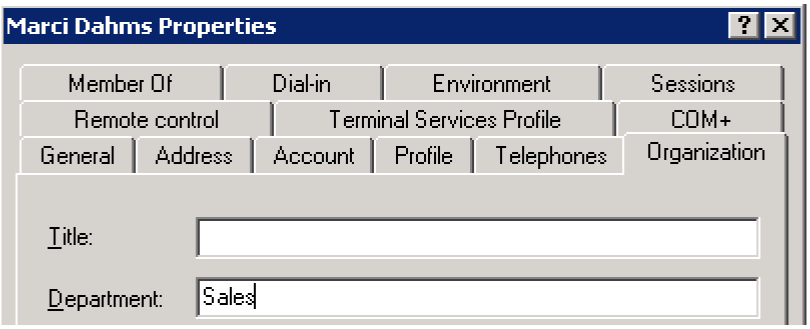
USE ACTIVE DIRECTORY TO SIMULATE INFOPATH USER ROLES

You have already added a connection to the Active Directory web service, in a previous lab. Now you will leverage that information to simulate InfoPath User Roles, which are disabled in browser forms.

When querying Active Directory, we really only need one property to be able to determine what the user should see in the form. In this case, we will use the **Department** property:



Title:

Department: Sales

We will set up the browser form to show different options for users who are a member of this Department.

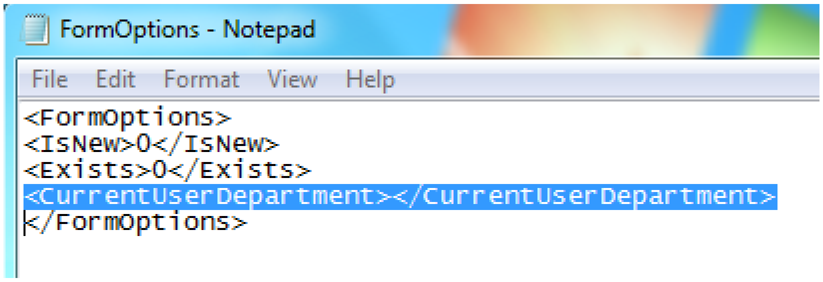
Note: You are not restricted to use this specific property. You could:

- Use any other property (i.e. zip code)
- Call GetManagerAlias, which determines the current user's manager, and base your form logic on that.
- Call IsUserMemberofGroup, to determine if a user is a member of a specific group, and base form logic on group membership.

USE THE ACTIVE DIRECTORY DATA TO OBTAIN USER INFO

1. With your form in design mode, go to **Data** > **Resource Files**.
2. Select **FormOptions** and click **Export**. Save the FormOptions.xml file to your computer.
3. Open FormOptions.xml in Notepad.

4. Add a node called **CurrentUserDepartment** and save the file

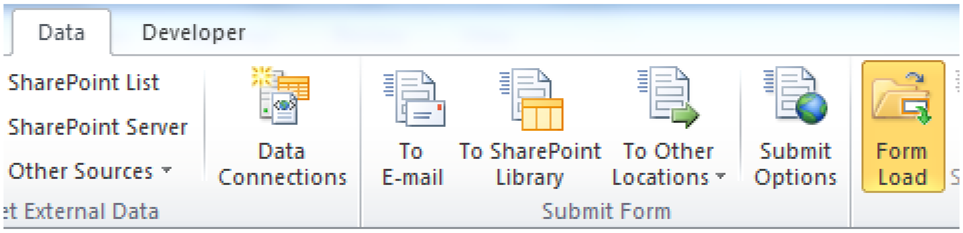


```
<FormOptions>
<IsNew>0</IsNew>
<Exists>0</Exists>
<CurrentUserDepartment></CurrentUserDepartment>
</FormOptions>
```

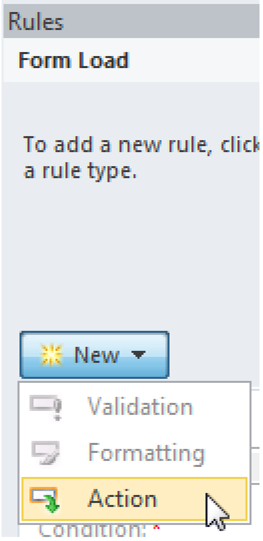
5. In **Data** > **Data Connections**, select **FormOptions** and click **Modify**.

6. Browse to attach the recently modified FormOptions.xml file and finish walking thru the data connection wizard.

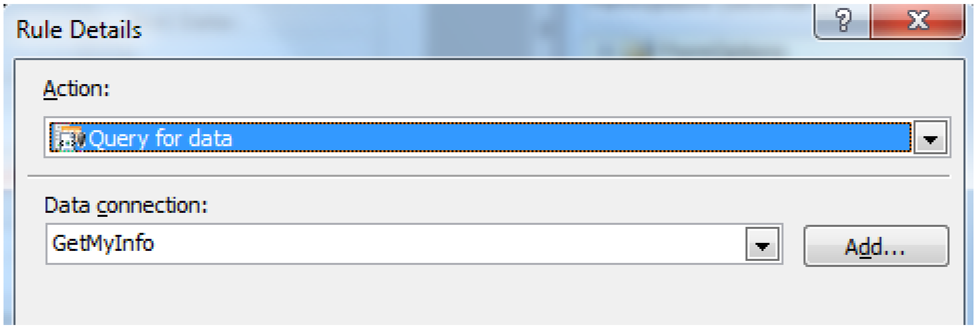
7. In the Data tab, click **Form Load**.



8. Click **New** and select **Action**. Call this action “Determine current user’s department”



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

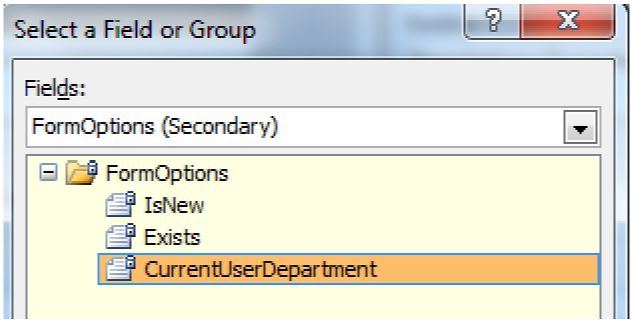


Action: Query for data

Data connection: GetMyInfo

10. Next to “**Run these actions**”, click **Add** and select “**Set a field’s value**”.

11. Click the icon to the right of “**Field**” and select the new node added in the FormOptions secondary data source.

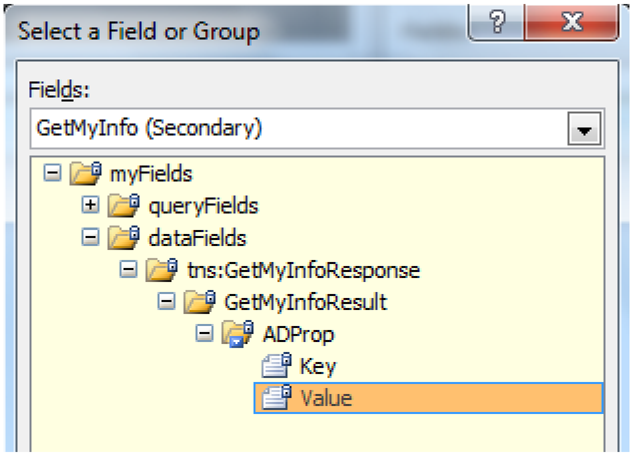


Fields: FormOptions (Secondary)

FormOptions
IsNew
Exists
CurrentUserDepartment

12. Click the icon to the right of “**Value**” and click **Insert field or Group**.

13. Use the dropdown to switch to the **GetMyInfo** secondary data connection.

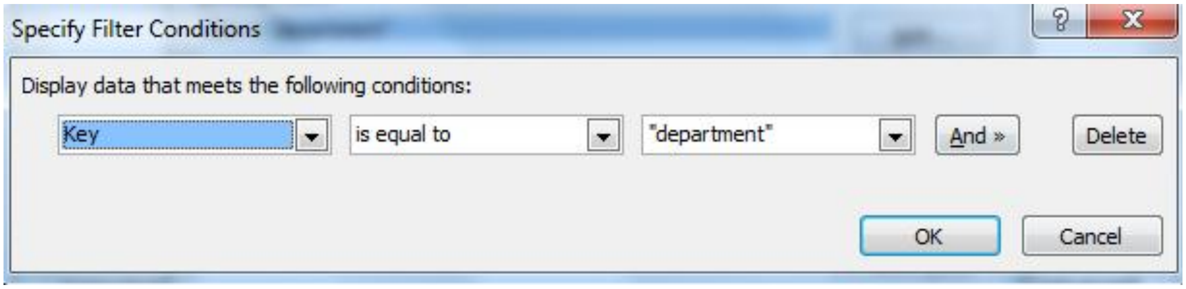


Fields: GetMyInfo (Secondary)

14. Expand the **datafields** node, select the **Value** node, and click **Filter Data**.

15. 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 Department.

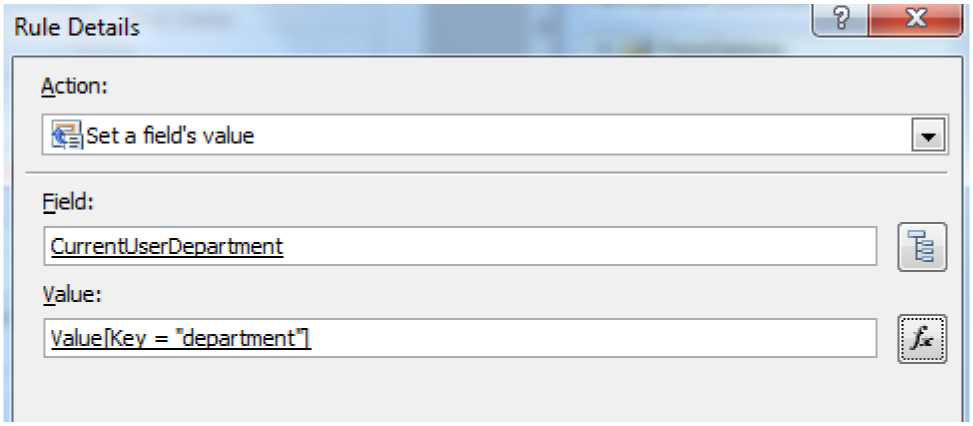
16. Select **Key** in the first dropdown and "**is equal to**" in the middle dropdown. In the third dropdown, select **Type text** and type in "**department**" (no quotes).



Display data that meets the following conditions:

Key | is equal to | "department"

17. Click OK until all dialogs are closed.



Action:

Set a field's value

Field:

CurrentUserDepartment

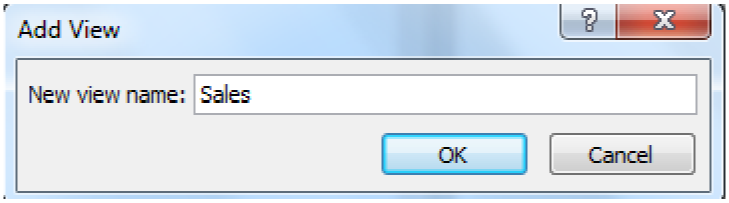
Value:

Value[Key = "department"]

ADD VIEW SWITCHING

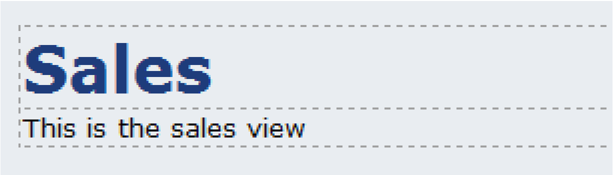
For the sake of illustrating the concept, let’s show how to switch views based on the department.

18. Go to **Page Design**.



New view name: Sales

19. Under **View**, add a new view and call it **Sales.**



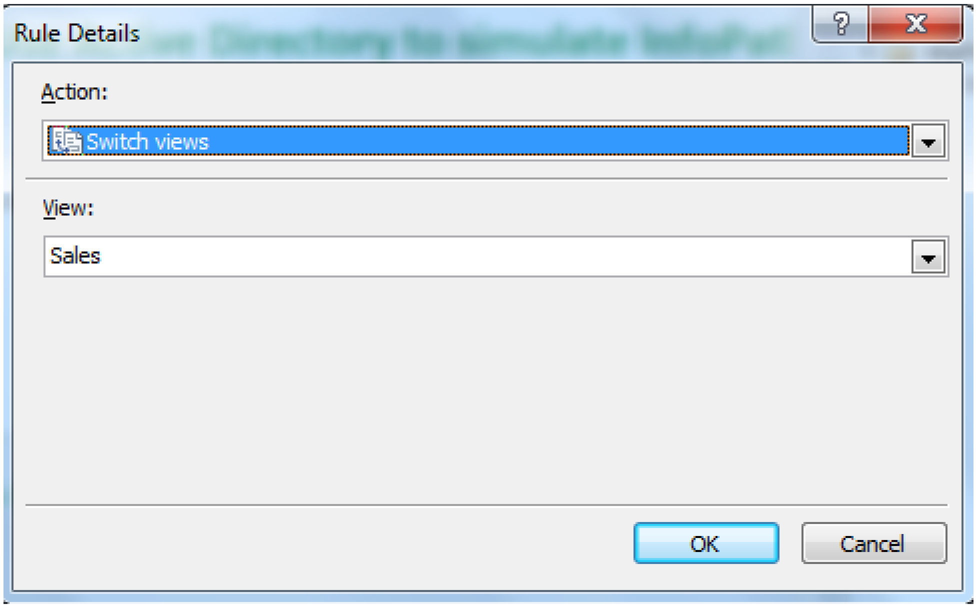
Sales

This is the sales view

We’ve added a very plain canvas, since this is just to illustrate the technique. In a real world scenario, you would design this view as desired.

20. Still under **Form Load**, click **New** and select **Action**.

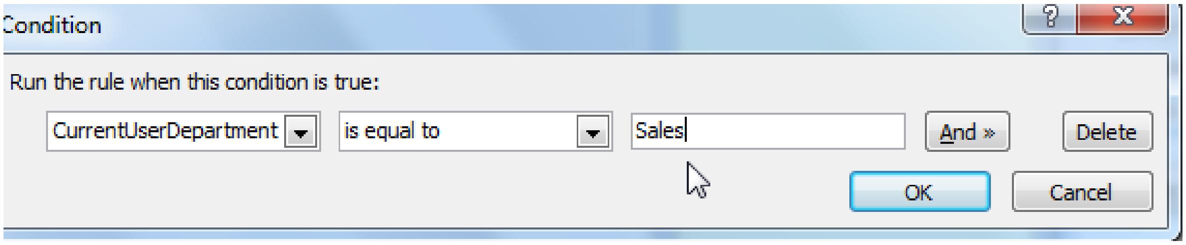
21. Next to “**Run these actions**”, click **Add** and select “**Switch views**”, and select the Sales view in the dialog.


Rule Details

Action: Switch views

View: Sales

22. We don't want this to always execute, so let's add a condition. Click on the blue text under "Condition".


Condition

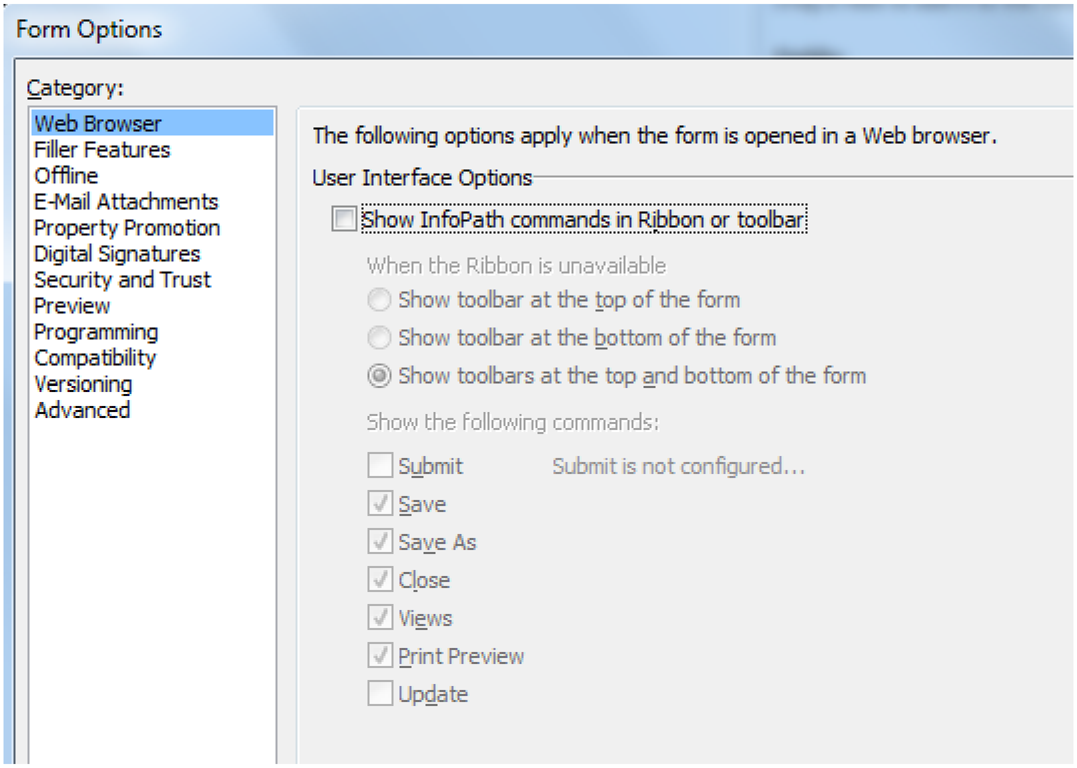
Run the rule when this condition is true:

CurrentUserDepartment | is equal to | Sales

23. In the first dropdown, select the CurrentUserDepartment node.
24. In the middle dropdown, select "is equal to".
25. In the third dropdown, select "Type text" and type in "Sales". Click **OK**.

TEST

26. Under **File** > **Form Options**, uncheck "Show InfoPath commands in Ribbon or toolbar" to ensure users won't switch views this way.



Form Options

Category:

- Web Browser
- Filler Features
- Offline
- E-Mail Attachments
- Property Promotion
- Digital Signatures
- Security and Trust
- Preview
- Programming
- Compatibility
- Versioning
- Advanced

The following options apply when the form is opened in a Web browser.

User Interface Options

□ Show InfoPath commands in Ribbon or toolbar

When the Ribbon is unavailable

○ Show toolbar at the top of the form
○ Show toolbar at the bottom of the form
● Show toolbars at the top and bottom of the form

Show the following commands:

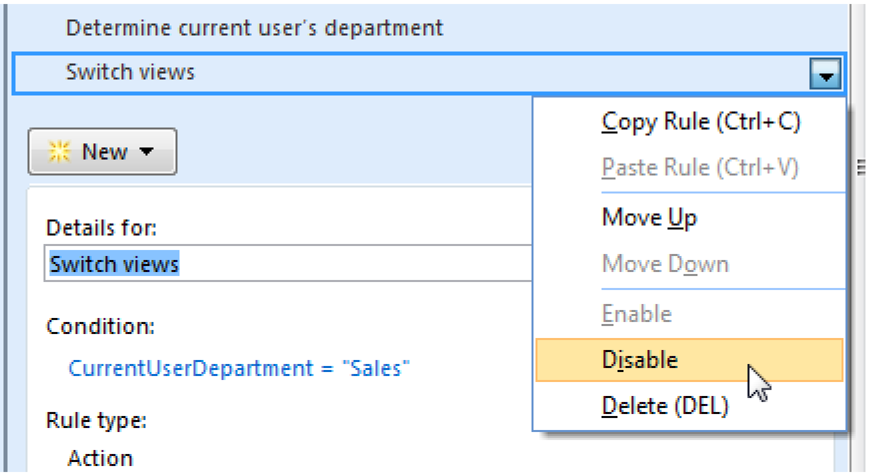
□ Submit Submit is not configured...
☑ Save
☑ Save As
☑ Close
☑ Views
☑ Print Preview
□ Update

27. Publish this form (remember: we have been attaching it to DAT in order to do this) and open the form, in the browser, using different user's accounts, some members of the Sales department and some not. Notice that the view switches as expected. (The training admin might choose to modify some user accounts to demonstrate this.)

CONDITIONAL FORMATTING ON INDIVIDUAL CONTROLS

Imagine that instead of an entire view, we want to control read/write ability on individual controls within one view.

28. Go to **Data** > **Form Load**, right click on the "Switch views" rule and select **Disable**. (We want to disable the action for the previous section of this document).



Details for:

Switch views

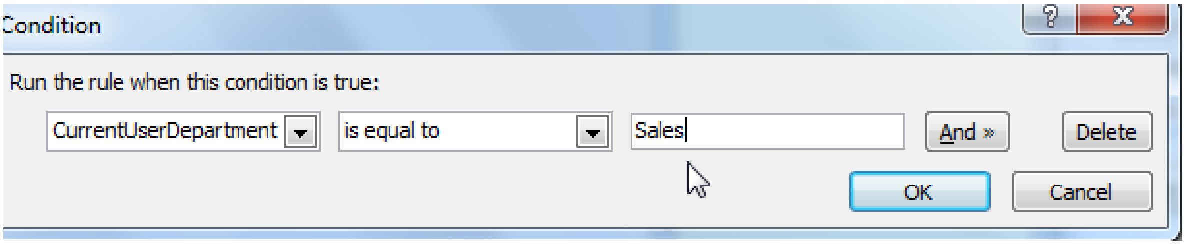
Condition:

CurrentUserDepartment = "Sales"

Rule type:

Action

29. Go to **Page Design** and switch back to **View 1** (the default view).
30. Select a control that you wish to hide based on the user role and then select **Home** > **Manage Rules**.
31. Select **New** > **Formatting**.
32. Click the blue text under "Condition". Enter the condition as shown in the screenshot below.



Run the rule when this condition is true:

CurrentUserDepartment | is equal to | Sales

33. Check the checkbox for Disable this control. (You could choose to check "Hide this control" instead.)

What we are accomplishing is making the control read only (or hidden!) if the user is not a member of the correct department.

TEST AGAIN

34. Republish this form and open the form, in the browser, using different user's accounts, some members of the department and some not. Notice that the textbox is read only for users depending on their department.