



PDF SHARE FORMS

Online, Offline, OnDemand

PDF forms and SharePoint are better together

Changing fields properties depending on current user

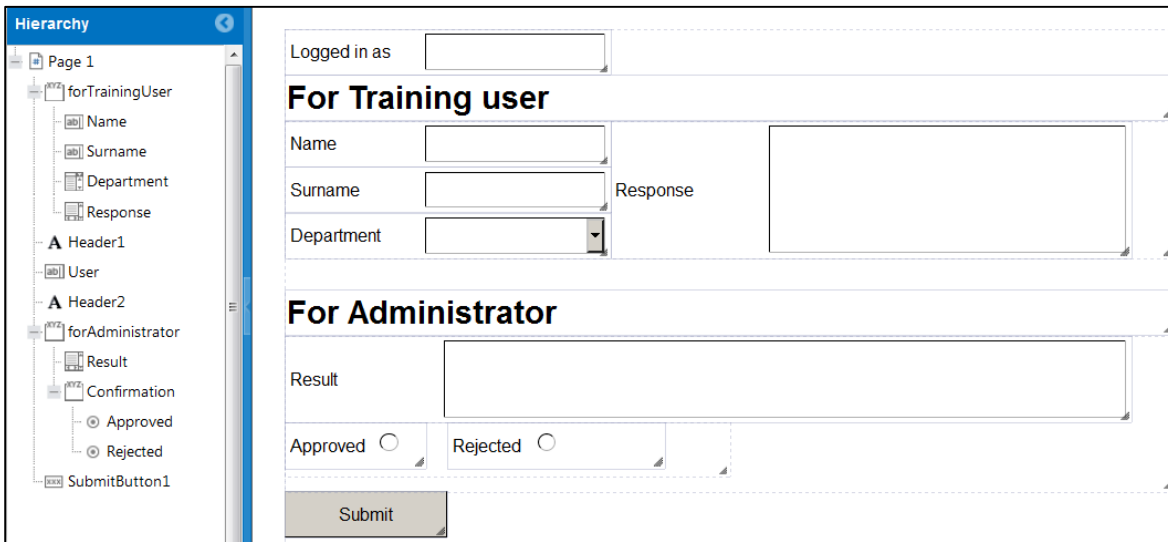
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This guide describe how to specify access to fields according currently logged user.

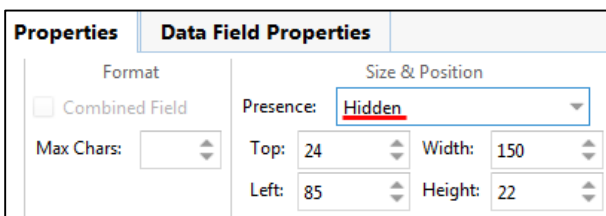
XFA (Dynamic) template

Step 1. Prepare template:



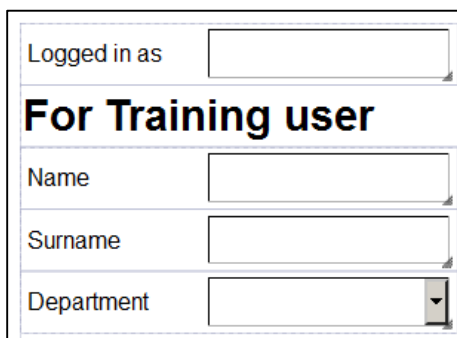
There are two sections. One section contain two text fields, dropdown and multiline text field and is available only for training users. Second section contain multiline text field and radio button group and it is available only for administrator. **Logged in as** text field show current user.

NOTE: **User** text field (with Label: “**Logged in as**”) must be set to hidden. It is set to visible only for demonstrativeness. Choose field and navigate to **PDF Form Tools** → **Properties** → **Presence**:

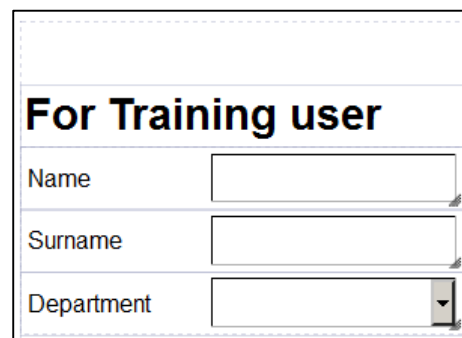


Result

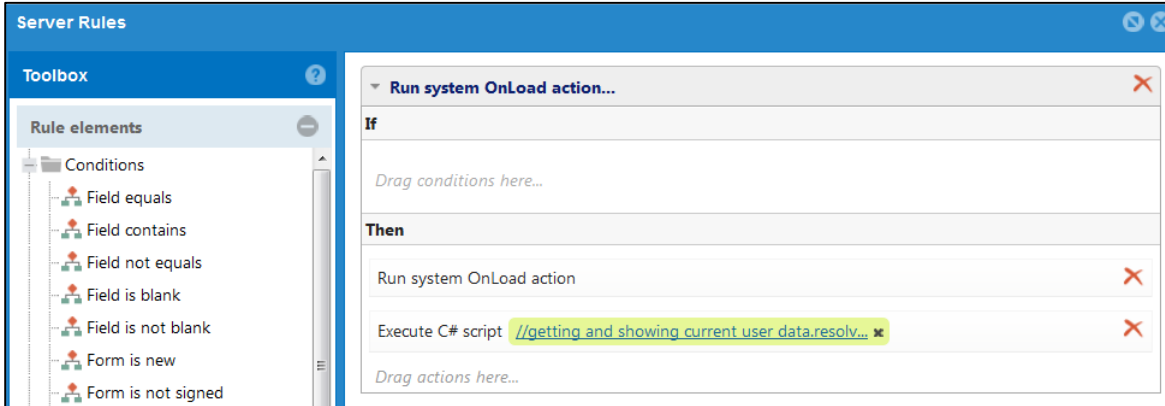
- Visible field



- Hidden field



Step 2. Add **Execute C# script** under **Run system OnLoad** action (PDF Form Tools → Developer → Form Load):



Script

```
//getting and showing current user
data.resolveNode("User").value = currentWeb.CurrentUser.Name;
```

Step 3. Add on **Form Ready** script (PDF Form Tools → Developer → Global Events → Form Ready):

```
if(xfa.resolveNode("$data..User").value == "Administrator"){
    xfa.resolveNode('$form.Root.Default..forTrainingUser').access = "readOnly";
}
if(xfa.resolveNode("$data..User").value == "Training User 005"){
    xfa.resolveNode('$form.Root.Default..forAdministrator').access = "readOnly";
}
```

With red are marked users. Need precise for specific cases.

If current user is **Administrator** then **forTrainingUser** section will be set to read only.

If current user is **Training User 005** then **forAdministrator** section will be set to read only.

NOTE: If there is requirement to set only one field it can be done like this:

```
xfa.resolveNode('$form.Root.Default..FieldName').access = "readOnly";
```

Step 4.1. Deploy template and create new document:

Logged in as

For Training user

Name

Surname Response

Department

For Administrator

Result

Approved Rejected

For Administrator section is set to read only because current user is **Training User 005**.

Step 4.2. Now log in as different user (in this example administrator) and open same document:

Logged in as

For Training user

Name

Surname Response

Department

For Administrator

Result

Approved Rejected

Now **For Training user** section is set to read only.

AcroForm (Static) template

Step 1. Prepare template:

The screenshot shows a form design tool interface. On the left is a 'Hierarchy' pane with a tree view containing: Page 1, User, Name, Surname, Department, Response, Results, Confirmation (with sub-items #Approved and #Rejected), and SubmitButton12. The main workspace displays a form with two sections: 'For Training user' and 'For Administrator'. The 'For Training user' section contains a text field, a Name field, a Surname field, a Department dropdown, and a large Response text area. The 'For Administrator' section contains a Results text area, two radio buttons labeled 'Approved' and 'Rejected', and a Submit button.

There are three text fields, one dropdown, two multiline text fields and one radio button group. **Name, Surname, Department** and **Response** fields appertain to **Training user**. **Results** and **Confirmation** belongs to **For Administrator** part.

NOTE: On the top is **User** field that show current user. It must be set to hidden.

Choose field and navigate to **PDF Form Tools** → **Properties** → **Presence**

The screenshot shows the 'Properties' panel with the 'Data Field Properties' tab selected. Under the 'Format' section, there is a 'Combined Field' checkbox. Under the 'Size & Position' section, the 'Presence' dropdown is set to 'Hidden'. Other settings include 'Max Chars', 'Top: 24', 'Width: 150', 'Left: 85', and 'Height: 22'.

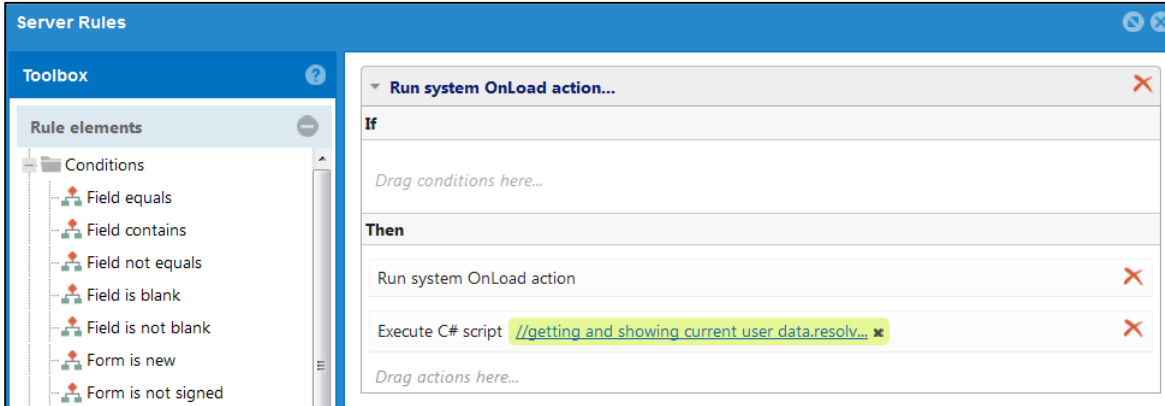
Result

- Visible field
- Hidden field

This screenshot shows the form template with the top field (the 'User' field) visible. The rest of the form, including the 'For Training user' and 'For Administrator' sections, is hidden.

This screenshot shows the form template with the top field hidden. The 'For Training user' and 'For Administrator' sections are visible.

Step 2. Add **Execute C# script** under **Run system OnLoad** action (PDF Form Tools → Developer → Form Load):



Script:

```
//getting and showing current user
data.resolveNode("User").value = currentWeb.CurrentUser.Name;
```

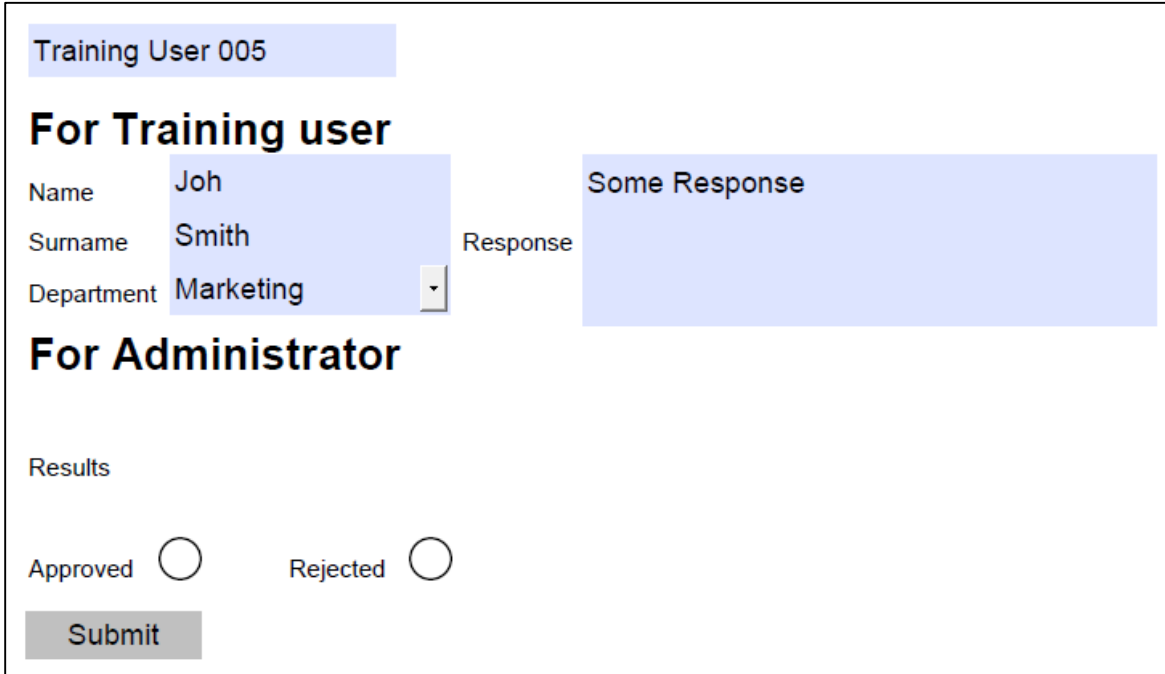
Step 3. Add **Global JavaScript** (PDF Form Tools → Developer → Global JavaScript):

```
if(this.getField("User").value=="Administrator"){
    this.getField("Name").readonly = true;
    this.getField("Surname").readonly = true;
    this.getField("Department").readonly = true;
    this.getField("Response").readonly = true;
}
if (this.getField("User").value=="Training User 005"){
    this.getField("Results").readonly = true;
    this.getField("Confirmation").readonly = true;
}
```

With red are marked users. Need precise for specific cases.

Since this is AcroForm (static) there is no sections, so there is no way to manipulate all fields at once.

Step 4.1. Deploy template and create new document:



Training User 005

For Training user

Name Joh
Surname Smith
Department Marketing

Response Some Response

For Administrator

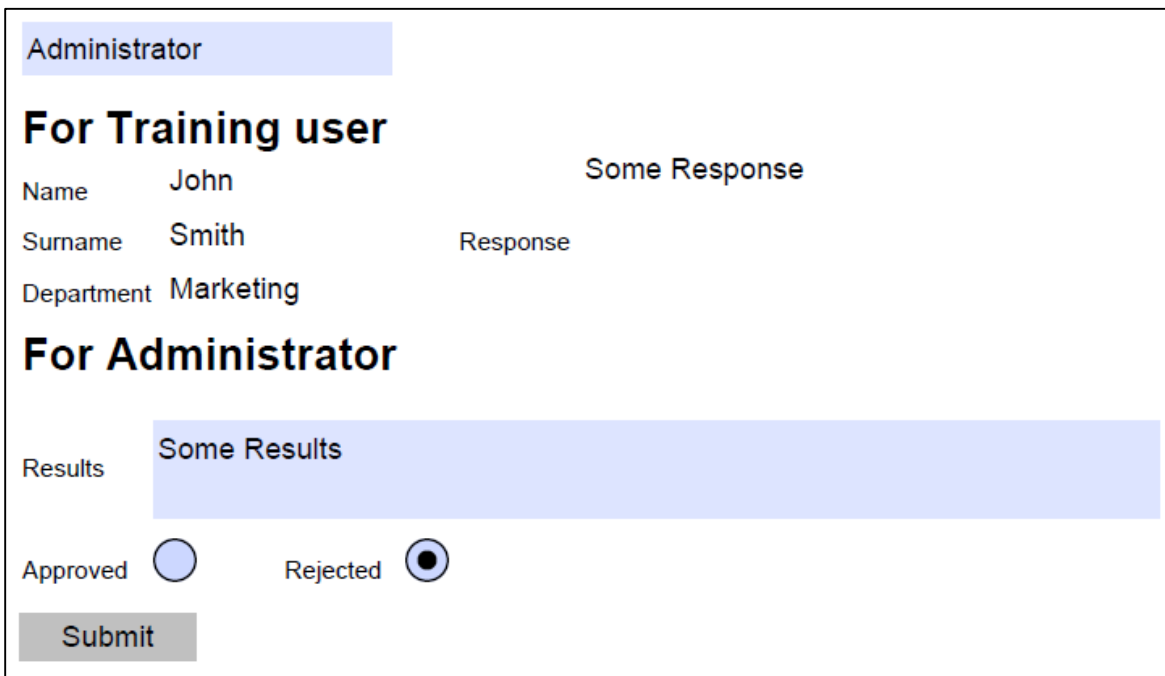
Results

Approved Rejected

Submit

Fields that assigned to **Administrator** user are locked.

Step 4.2. Now log in as different user (in this example administrator) and open same document:



Administrator

For Training user

Name John
Surname Smith
Department Marketing

Response Some Response

For Administrator

Results Some Results

Approved Rejected

Submit

Fields that assigned to **Training user** are locked.