How to…

Retrieve a user's Display Name from their login name

This document will describe to methods of looking up a user's display name for use in a workflow. The first method will query Active Directory using the 'Query LDAP' action and the second method calls a SharePoint web service.

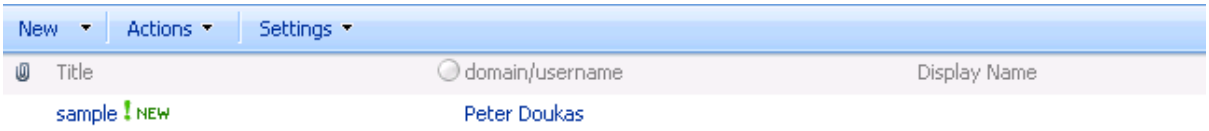
Creating the workflow:

This workflow will be running on a list with a created field of type Person/Group. The example List used in this How To was set up as follows:

A column stores information about each item in the list. The following columns are currently available in this list:

Column (click to edit)	Type	Required
Title	Single line of text	✔
domain/username	Person or Group	✔
Created By	Person or Group	
Modified By	Person or Group	

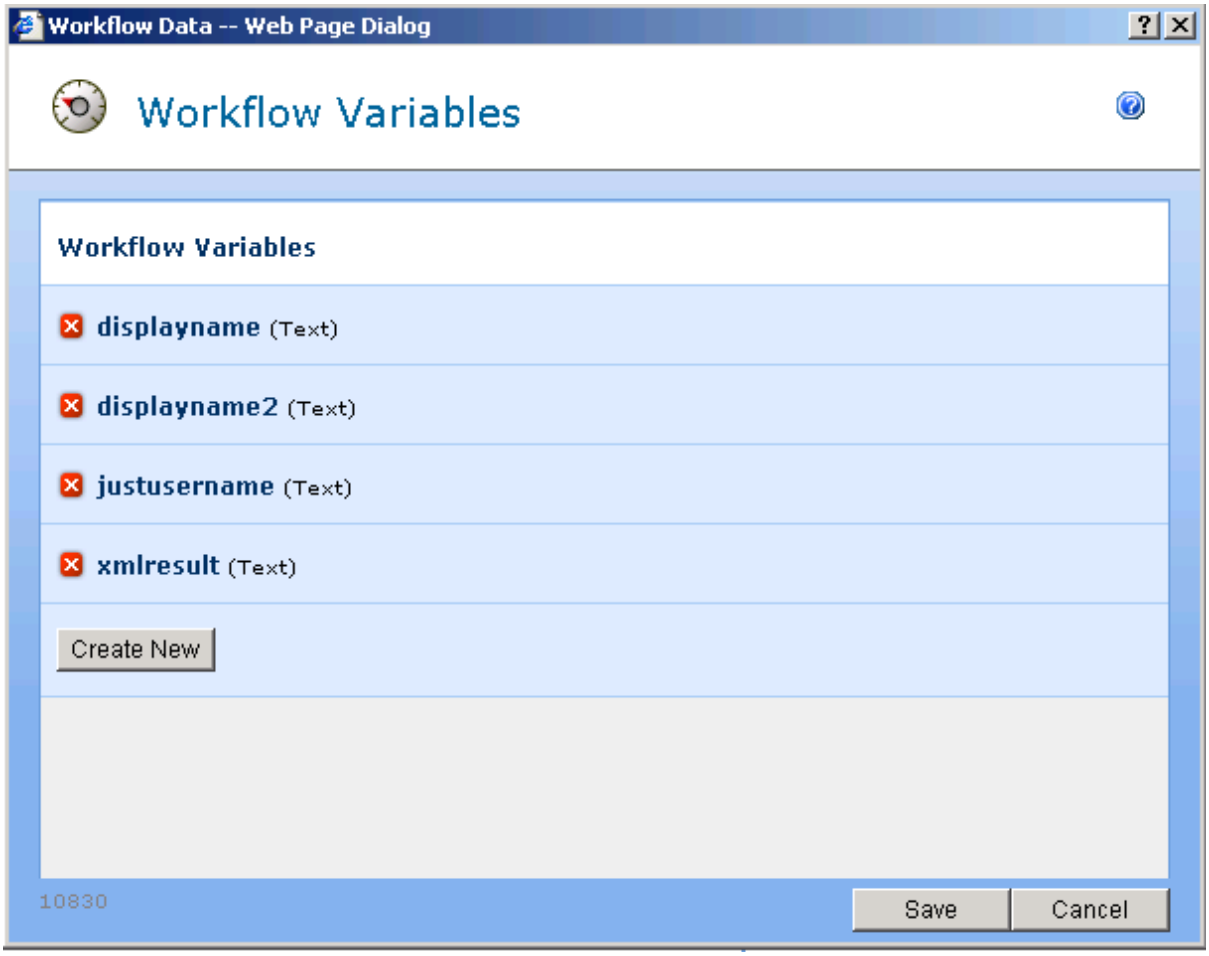
When creating an item for the workflow to run on a valid user for your domain must be selected for the field domain/username. For example:



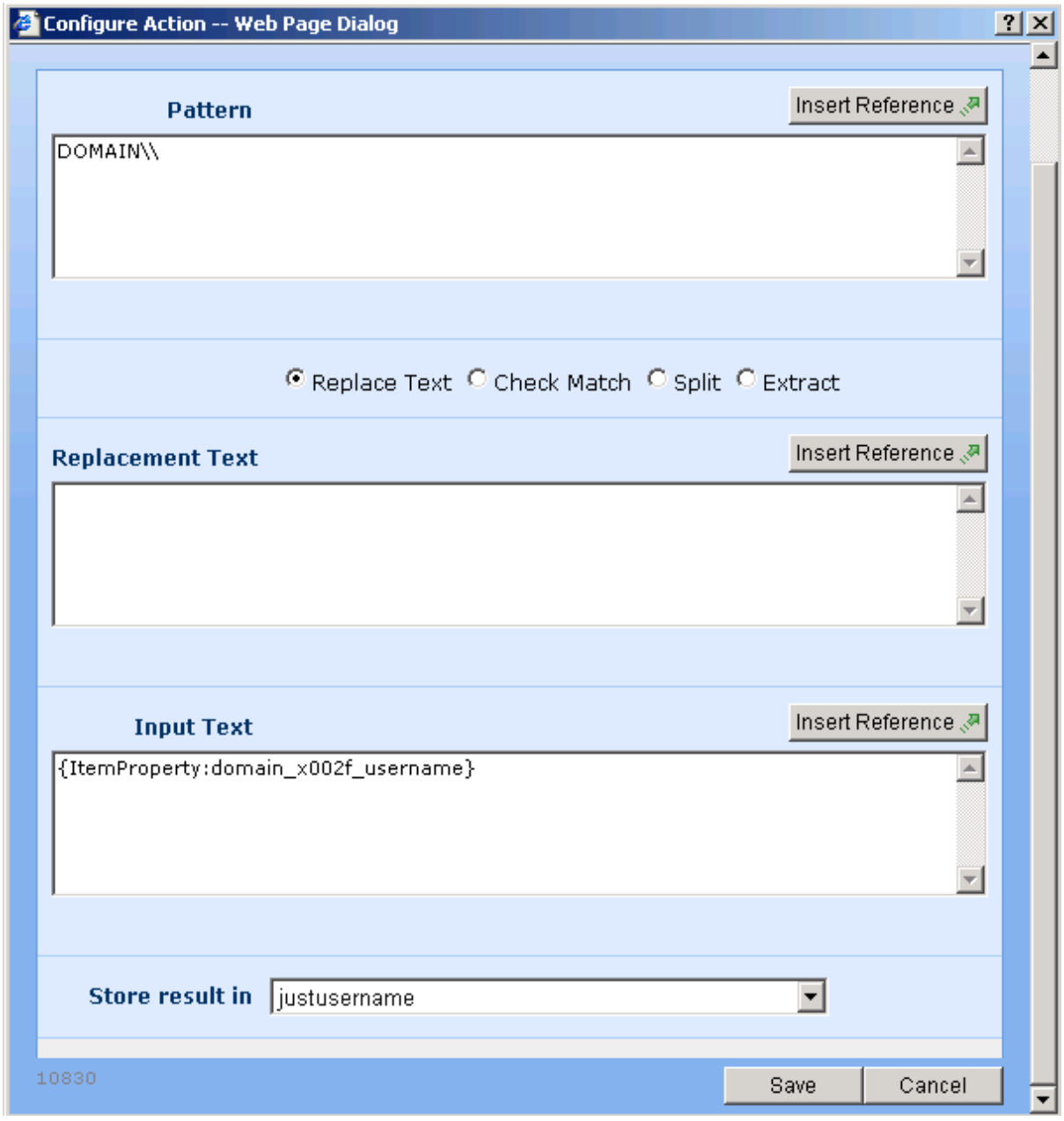
Note: SharePoint will display the user's display name in the list view, however when a workflow reads this value, it will retrieve the domain\login name of the user.

The finished workflow will look similar too:

- The first step is to create the workflow variables that will be required. Click Settings->Workflow Variables and add the following variables.

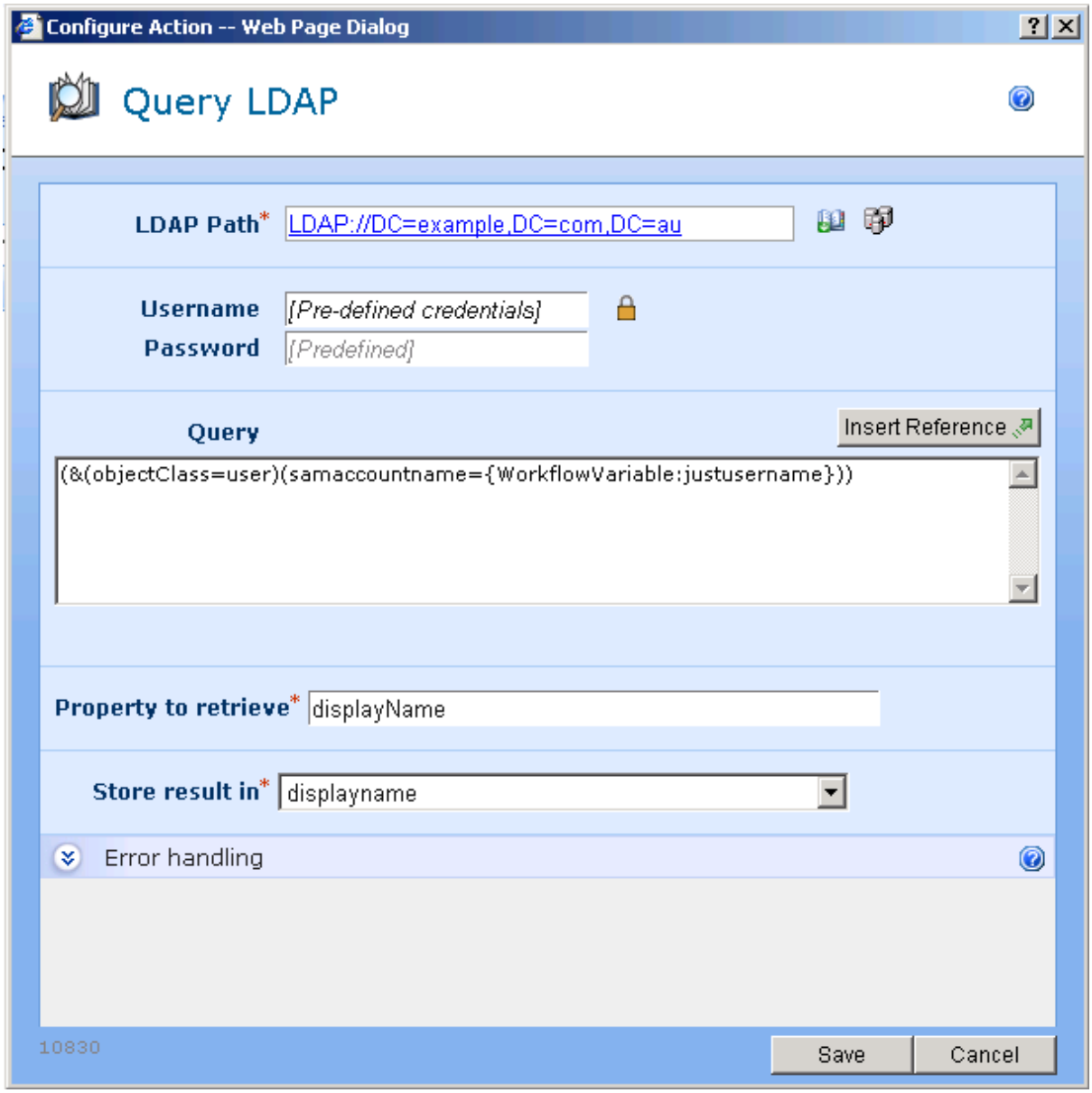


- To be able to use the information selected from the person / group field in a Query LDAP action we must first remove the DOMAIN\ component from the selected user. This is done using a Regular expression action which is configured as follows:



Note: replace DOMAIN with your actual domain name. Two back slash characters are used instead of a single double slash because the '\' character has a special meaning in regular expressions. Adding an extra back slash tells the regular expression to treat this as a single back slash character.

- Now the username is in the format recognized in LDAP queries, it can be used within a LDAP query to retrieve the information we require and store it into the workflow variable 'displayname'. The query itself is configured as follows:



Note: Change the LDAP Path to point to the Active Directory for your environment. The username and password must be a valid AD account with at least read access.

When this Query LDAP action runs, the user's display named will be stored in the displayName variable.

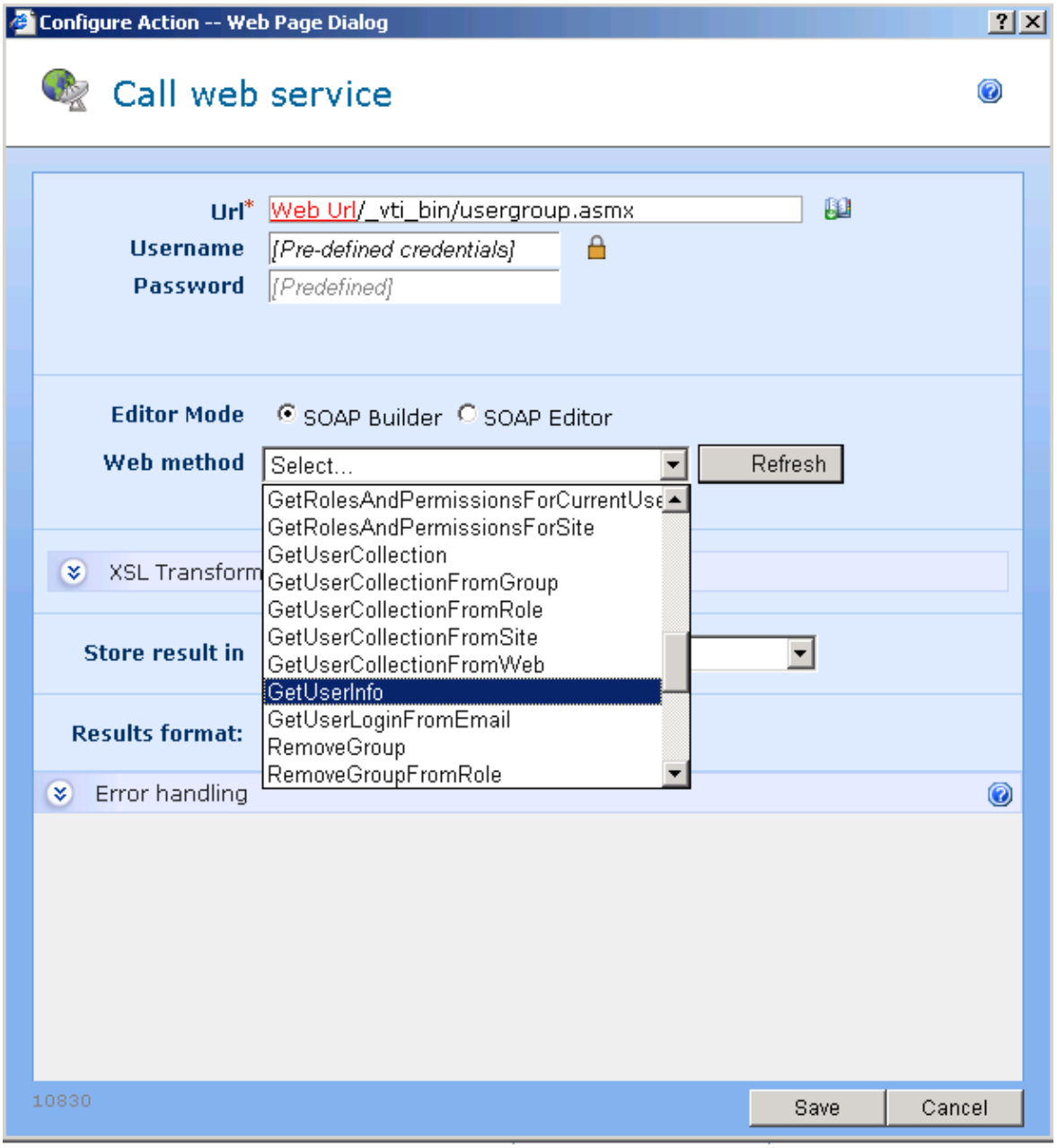
The following steps show an alternative method of retrieving the display name by querying a SharePoint web service.

- Next add the first workflow action 'Call Web Service'. Configure it with the following:

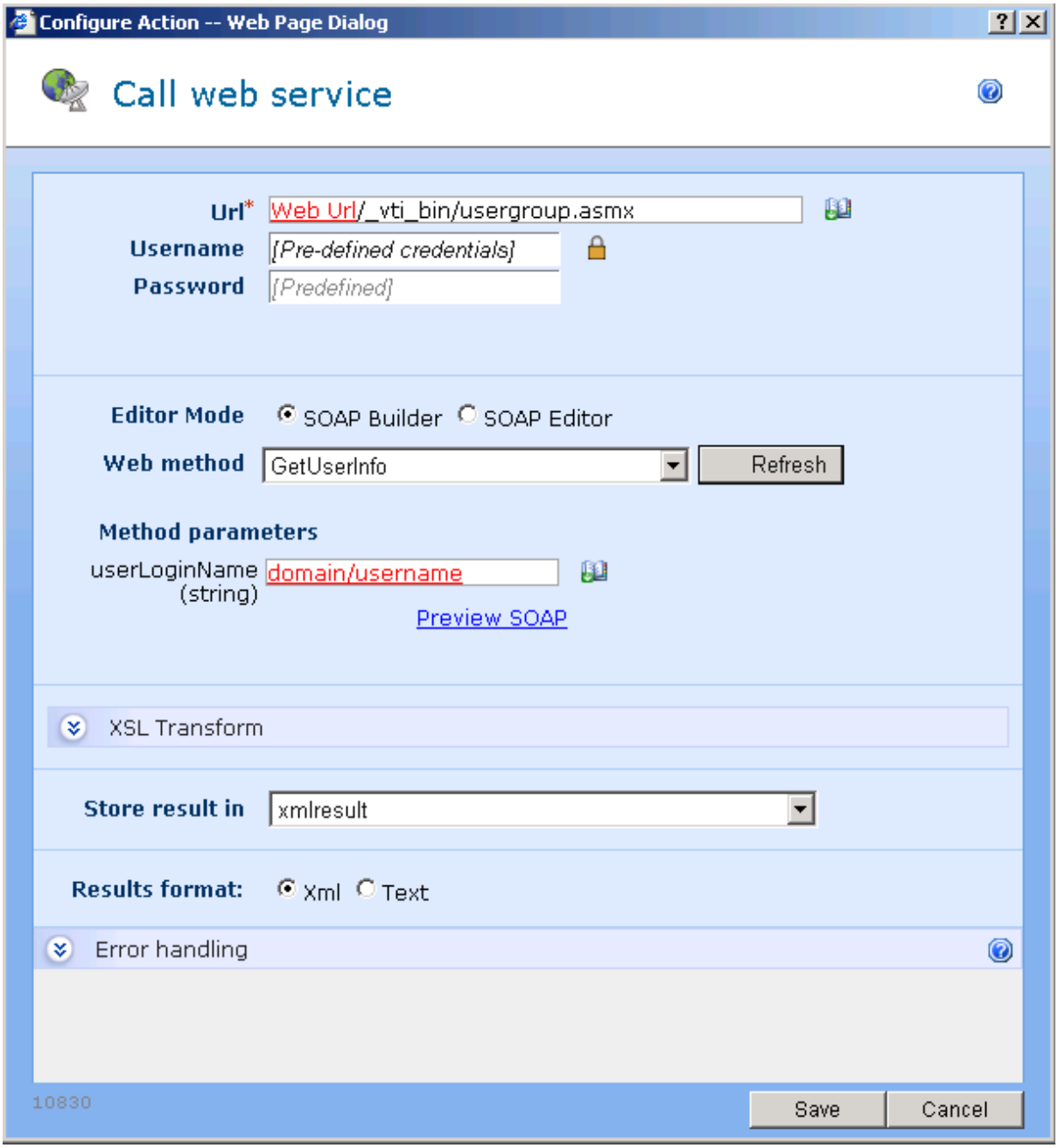
  Url - Insert a reference to the Web URL first (click on the insert reference icon to the right side of the text box) then insert the text '/ _vti_bin/UserGroup.asmx' to complete the path to the web service.

  Username & Password - Configure these with an account that has permissions to call the SharePoint web service.

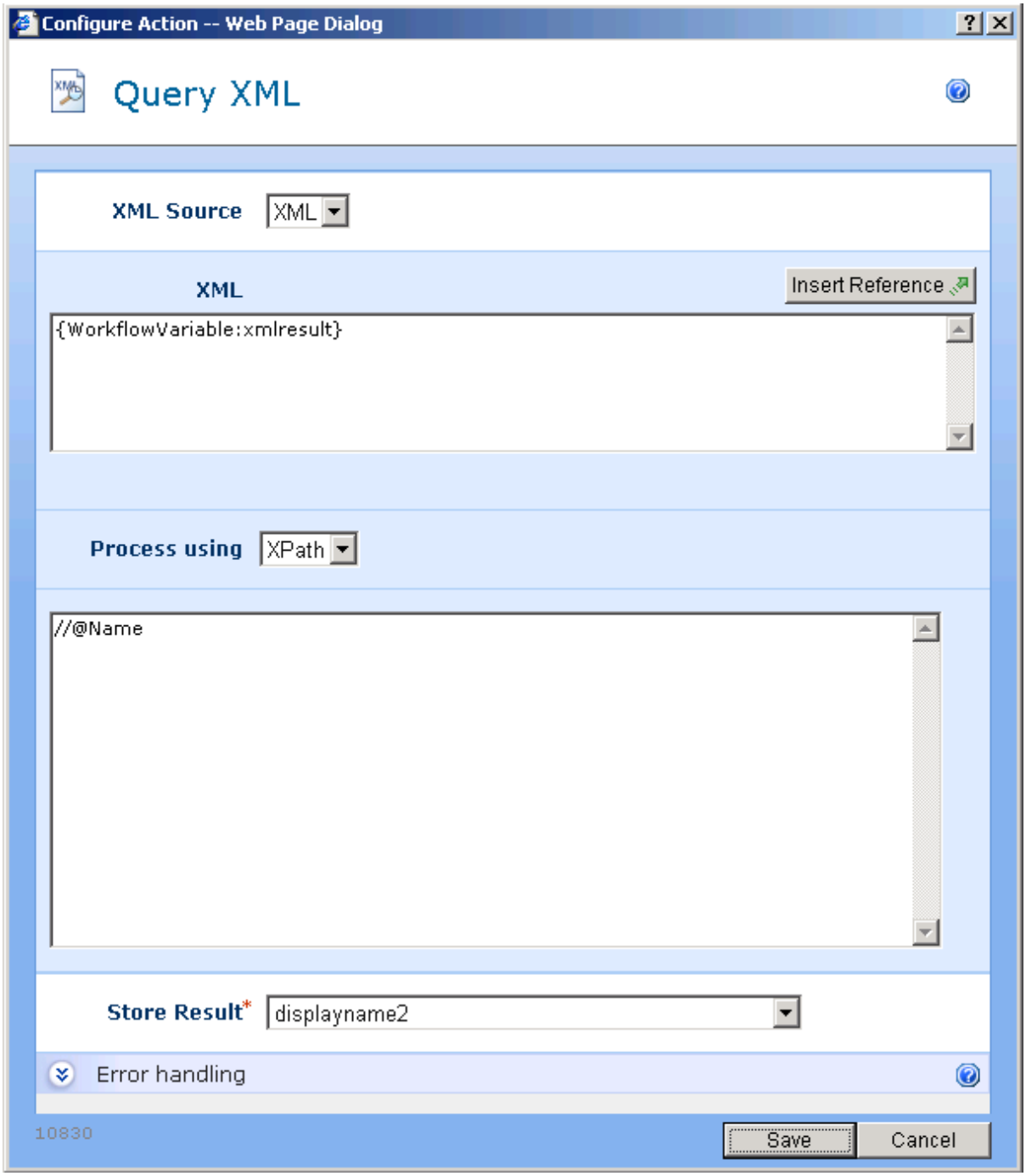
  Once this information has been entered click the refresh button (and press OK when prompted) and you should be able to select the appropriate method from the drop down list. We will use the GetUserInfo method of the web service (http://msdn.microsoft.com/en-us/library/ms774637.aspx) as shown:

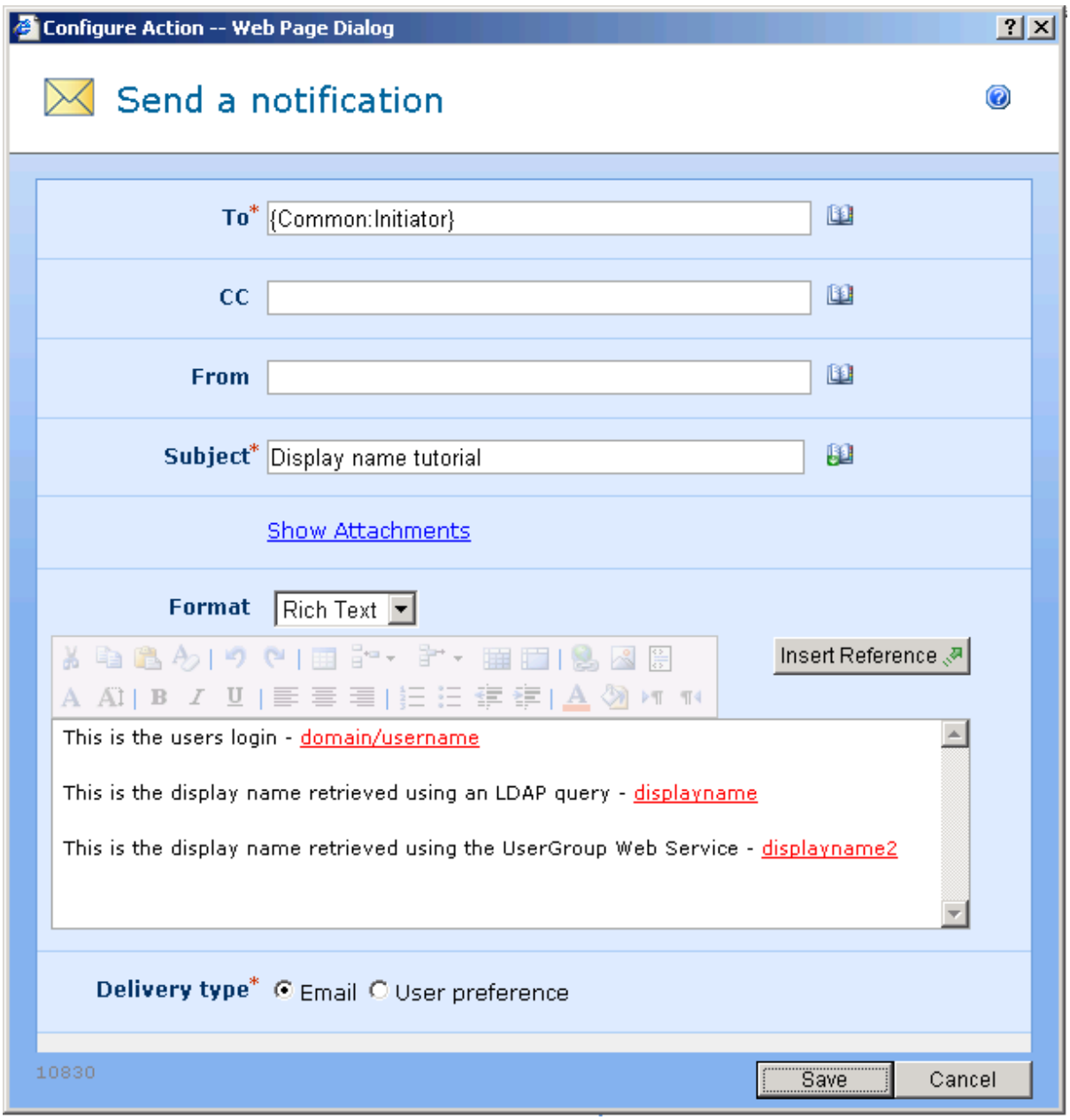

Configure Action -- Web Page Dialog
Call web service
Url*
Web Url/_vti_bin/usergroup.asmx
Username
[Pre-defined credentials]
Password
[Predefined]
Editor Mode
SOAP Builder
SOAP Editor
Web method
Select...
Refresh
GetRolesAndPermissionsForCurrentUse
GetRolesAndPermissionsForSite
GetUserCollection
GetUserCollectionFromGroup
GetUserCollectionFromRole
GetUserCollectionFromSite
GetUserCollectionFromWeb
GetUserInfo
GetUserLoginFromEmail
RemoveGroup
RemoveGroupFromRole
XSL Transform
Store result in
Results format:
Error handling
10830
Save
Cancel

- Make sure parameters panel is in the SOAP Builder mode. Simply insert a reference to the 'domain/username' field from the item properties for the 'userLoginName' parameter. Select the 'xmlresult' variable to store the results in.



- The web service will return a fragment of xml. The next step will parse the xml returned from the web service to extract the display name value that we need so it can be used in other workflow actions. To do this we use the 'Query XML' action. Configure the ‘Query XML’ action to perform the following XPath query to extract the ‘name’ value into the ‘displayname2’ variable.



The ‘displayname2’ variable will now contain the user’s display name retrieved from SharePoint.

- Now we can test the results by sending an email to the workflow initiator using the 'send a notification action'. Configure the notification as follows: