

This page contains dynamic content -- Highest Possible Classification is UNCLASSIFIED//FOR OFFICIAL USE ONLY

Zulu 13:01:33 (Zulu 0:00)	East Coast 09:01:33 (EDT -4:00)	Kuwait 16:01:33 (AST 3:00)	UAE Oman 17:01:33 (GST 4:00)	Kabul 17:31:33 (AFT 4:30)	Pakistan 18:01:33 (PKT 5:00)	Kyrgyzstan 19:01:33 (KGT 6:00)
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Publishing Root

How do I use the Request data action

Question

How do I use the Request data action in Nintex Workflow

When and where does this occur

This can occur when you need users to provide additional data.

Answer

You can access the **Request data** action in **Nintex Workflow** from the **User interaction** section of the Workflow toolbox. Double-click the action to configure the settings. Enter a name for a new content type, then create the fields to input the additional data. Save and publish the workflow to create the content type and associated fields.

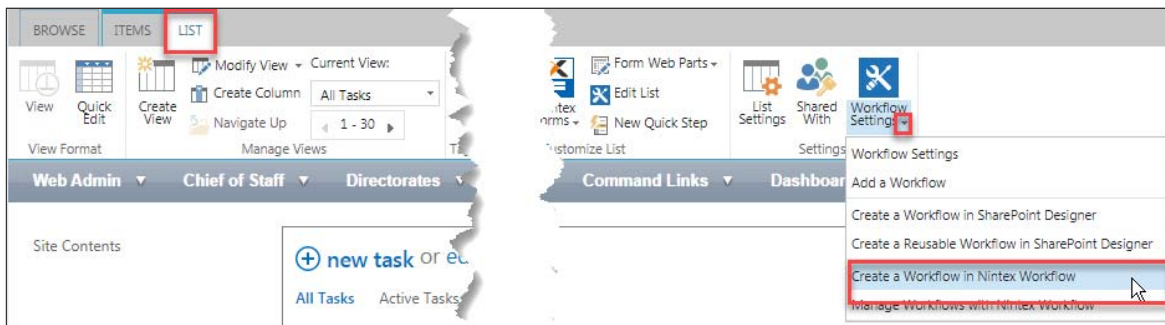
Note — You cannot create lookup fields from the Configure Action - Request data dialog. You must first create the content type, publish the workflow, then create the lookup fields from the Site Content Type page.



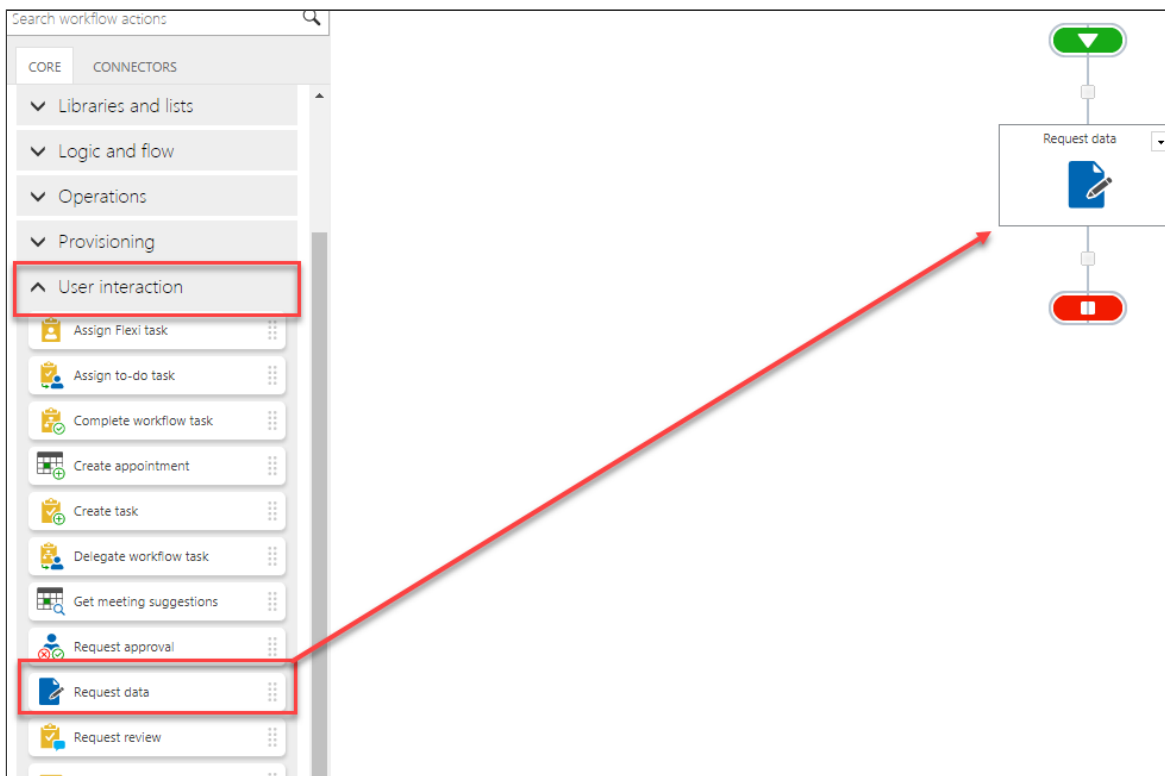
Requesting more data associated to a Nintex workflow

In this example, you created a travel form users must submit when traveling to other store locations. Later, your accountant informs you that additional data is needed for travel reimbursement. You decide to create a workflow requesting the additional data such as the state and the store/franchise the employee visited. You already have the state and store locations created in other **SharePoint** lists you can use for lookup fields, but you also decide to add a text field for additional comments.

1. Navigate to the **SharePoint** list associated to the travel form. Click the **LIST** tab, click the down arrowhead (▼) on the **Workflow Settings** button, and then select **Create a Workflow in Nintex Workflow** on the menu.



2. **Nintex Workflow** opens. Click the V on the **User interaction** section of the Workflow toolbox. Click and drag the **Request data** action and drop it on a design pearl.




3. Double-click the **Request data** action to configure the settings. The Configure Action - Request data dialog appears.

Configure Action - Request data

GENERAL

Save Cancel Action Task Notification Not Required Notification Reminders Escalation Edit Task Form Labels Common Variables Help

Commit Settings Variables Help

Collect data from * Initiator: 

Content type * Use existing Create new

Content type fields

[+ Add field](#)

Only show fields with variables assigned

Display link to workflow item on the task form

Display the item properties panel on the task form

Allow attachments

Store attachment URLs in

Task description [Insert Reference](#)

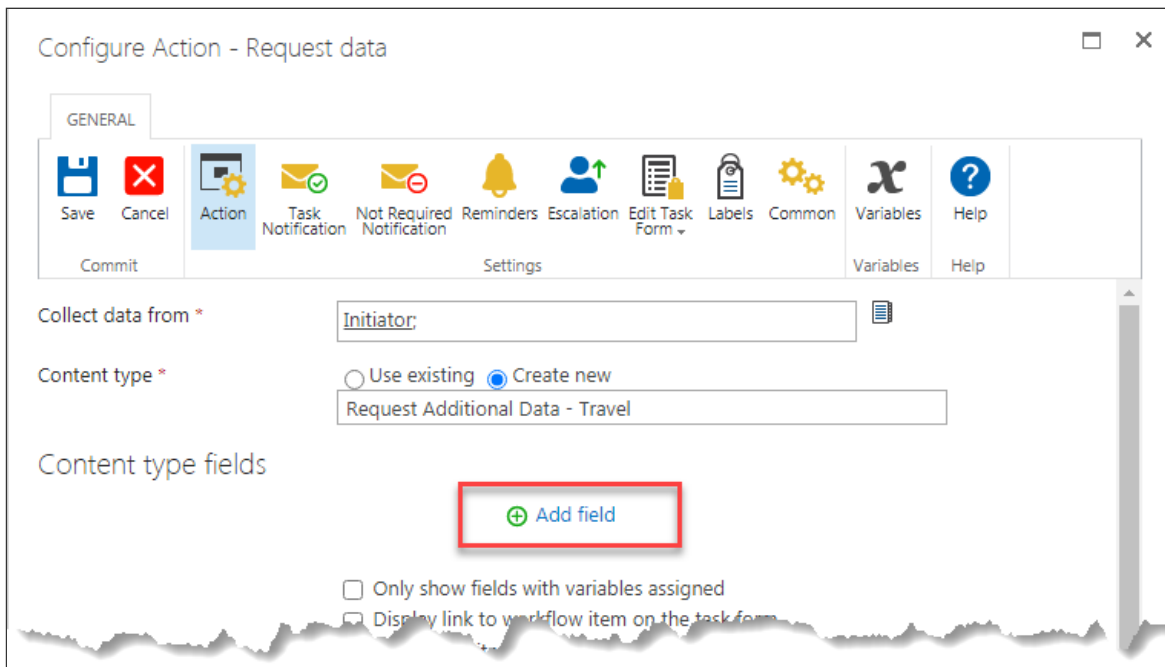
Please enter the following information.

Allow delegation

Task name

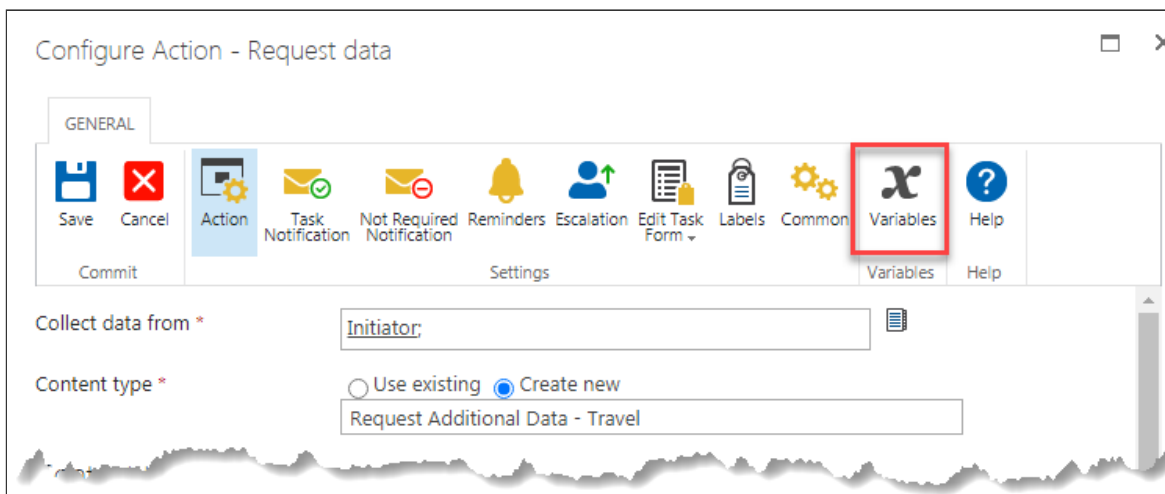
Priority (2) Normal

4. In the **Collect data from** field, enter the user email address, or user group. To access the People and Groups dialog, click the **Browse** (book) icon to the right of the field.
5. In the **Content type** field, select the **Create new** option. In the input field, enter a name for the content type, such as **Request Additional Data - Travel**.
6. Click the **Add field** hyperlink. A data entry dialog appears. In the **Name** field, enter a name for the field, such as **Comments**.



Note — In the **Type** dropdown, you can see there is no option for a lookup field.

7. Click **OK** to save your changes and close the data entry dialog. On the GENERAL ribbon, click the **Variables** button.
8. The Workflow Variables dialog appears. Click **New**.



9. The Create Workflow Variable dialog appears. In the **Name** field, enter a name for the variable to store the results entered in the **Comments** field, such as **mtxtComments**.

Note — For variables naming convention, see KB article #119, [What is the Collection operation](#).

Create Workflow Variable

WORKFLOW VARIABLES

Save Cancel Help
Commit Help

Name:

Type:

- Single line of text
- Multiple lines of text
- Choice
- Number
- Date and Time
- Yes/No
- Person or Group
- Integer
- List Item ID
- Action ID
- Collection

Default value:

10. Click **Save** to save your changes and close the dialog. You are returned to the Workflow Variables dialog,
11. The variable you just created shows on the variables list. Click **Close** to exit the dialog.

Workflow Variables

WORKFLOW VARIABLES

Close New Delete Modify Help
Commit New Actions Help

Name	Type	Show on start form
mtxtComments	Multiple lines of text	No

12. You are returned to the Configure Action - Request data dialog. In the **Comments** dropdown, select the variable you created in which to store the results, such as **mtxtComments**.

Configure Action - Request data

GENERAL

Save Cancel Action Task Notification Not Required Notification Reminders Escalation Edit Task Form Labels Common Variables Help

Commit Settings Variables Help

Collect data from * Jones Owners

Content type * Use existing Create new
Request New Data - Travel
[Edit the content type](#)

Content type fields

Comments (Multiple lines of text) mtxtComments

13. Click **Save** on the GENERAL ribbon to save your changes and close the Configure Action - Request data dialog.
14. **Save** and **Publish** your workflow.

Note — You must publish your workflow to create the new content type.

15. Navigate to the Site Settings ► Site Contents page and click the new content type hyperlink, such as **Request New Data - Travel**.

Site Content Type	Parent	Source
AFCENT Content Types		
AFCENT Published Documents	Document	AFCENT SCO/SM Training
AFCENT Published Media	Rich Media Asset	AFCENT SCO/SM Training
Business Intelligence		
Excel based Status Indicator	Common Indicator Columns	AFCENT SCO/SM Training
Fixed Value based Status Indicator	Common Indicator Columns	AFCENT SCO/SM Training
Report	Document	AFCENT SCO/SM Training
SharePoint List based Status Indicator	Common Indicator Columns	AFCENT SCO/SM Training
SQL Server Analysis Services based Status Indicator	Common Indicator Columns	AFCENT SCO/SM Training
Web Part Page with Status List	Document	AFCENT SCO/SM Training
Community Content Types		
Category	Item	AFCENT SCO/SM Training
Community Member	Site Membership	AFCENT SCO/SM Training
Site Membership	Item	AFCENT SCO/SM Training
Custom Content Types		
ApproveHR	Workflow Task	SCO/SM Technical Writer
EmployeeContentType	Item	SCO/SM Technical Writer
LeaveRequest	Workflow Task	SCO/SM Technical Writer
Request New Data - Travel	Workflow Task	SCO/SM Technical Writer
Training	SPTTraining	SCO/SM Technical Writer

16. The Site Content Types ► Site Content Type page appears. Scroll to the bottom and click the **Add from new site column** hyperlink.

- Add from existing site columns
- Add from new site column
- Column order

17. The Site Columns ► Create Site Column page appears. In the **Column name** field, enter a name for field, such as **State**.
18. Select **Lookup** for the field type.
19. In the **In this column** dropdown, select the name of the column associated to state names, such as **Title**. Click **OK** to save your changes and close the page.
20. Repeat steps 17-19 to create the lookup field for the store location. The Site Content Type page now shows the three fields associated to the new content type.

Comments	Multiple lines of text	Optional
State	Lookup	Optional
Stores	Lookup	Optional

21. Navigate back to your **Nintex** workflow and create two **Single line of text** variables: one for the new **State** field results, such as **txtState**, and one for the new **Store** field results, such as **txtStore**.

Workflow Variables

WORKFLOW VARIABLES

Close New Delete Modify Help

Name	Type	Show on start form
mtxtComments	Multiple lines of text	No
txtState	Single line of text	No
txtStore	Single line of text	No

22. Save your changes and close the Workflow Variables dialog.
23. In the **State (Lookup)** dropdown, select the variable to store the results, such as **txtState**.
24. In the **Stores (lookup)** dropdown, select the variable to store the result, such as **txtStore**.

Note — If the new fields do not appear in the **Content type fields** section, click the down arrowhead on the **Content type** dropdown (▼) and select another option, then reselect your new content type, such as **Request New Data - Travel**. This refreshes the Configure Action - Request data dialog.

Configure Action - Request data

GENERAL

Save Cancel Action Task Notification Not Required Notification Reminders Escalation Edit Task Form Labels Common Variables Help

Commit Settings Variables Help

Collect data from * Jones Owners:

Content type * Use existing Create new
Request New Data - Travel
[Edit the content type](#)

Content type fields

Comments (Multiple lines of text) mtxtComments

State (Lookup) txtState

Stores (Lookup) txtStore

Publish task edit form
 Only show fields with variables assigned
 Display link to workflow item on the task form
 Display the item properties panel on the task form
 Allow attachments

Store attachment URLs in

Task description [Insert Reference](#)

Please enter the following information.

25. In the **Task description** field, enter a description for the task.

26. On the GENERAL ribbon, click the **Task Notification** button. In the text field, enter a message about the additional request for data.

Configure Action - Request data

GENERAL

Save Cancel Action Task Notification Not Required Notification Reminders Escalation Edit Task Form Labels Common Variables Help

Commit Settings Variables Help

Delivery type Email User preference None

CC

BCC

From

Importance Normal

Subject Input required

Attachments [Add attachment](#)

Rich Text

Hello [Initiator](#):

If you want to be reimbursed for your travel expenses, please click the link below and provide the additional information. You can also enter any comments about your travel.

[Context Item Display Name](#)

Click [here](#) to access the fields for this information.

Jack Black - Accountant

27. Click **Save** to save your changes and close the dialog.

28. Publish and test your workflow. An email appears in the traveler's inbox requesting the additional data.

Workflow Notification

Hello Johnny "Red" Walker:

If you want to be reimbursed for your travel expenses, please click the link below and provide the additional information. You can also enter any comments about your travel.

Click [here](#) to access the fields for this information.

Jack Black - Accountant

29. When the user clicks the hyperlink, a Workflow Tasks : Request data web page appears.

Workflow Tasks : Request data

of Staff ▾ Directorates ▾ Special Staff ▾ CAOC ▾ Wings ▾ Components ▾ LNOs ▾ Command Links ▾

Please enter the following information.

Comments

State

Stores

30. The traveler can enter the additional information and click **Complete task**.

Additional Resources

- [What is the Request data action](#)
- [How do I create a variable](#)
- [How do I use the Flexi task action](#)
- [What is the Collection operation](#)
- [How do I manually start a workflow](#)
- [What is the Update item action](#)
- [How do I use the Update item action](#)