How do I use the Request data action

Question

How do I use the Request data action in Nintex Workflow

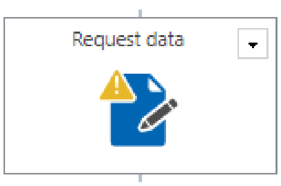
When and where does this occur

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.

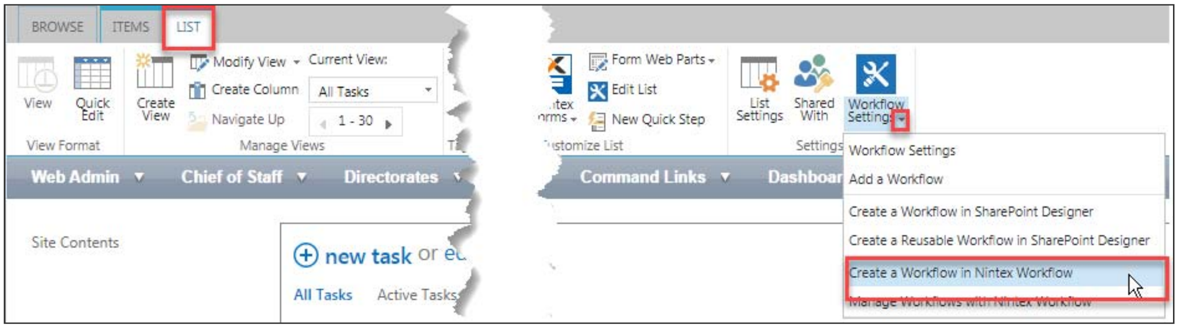
> **Note** — You cannot create lookup fields from the Configure Action - Request data dialog. You must first create the content type, publish the workflow, then create the lookup fields from the Site Content Type page.



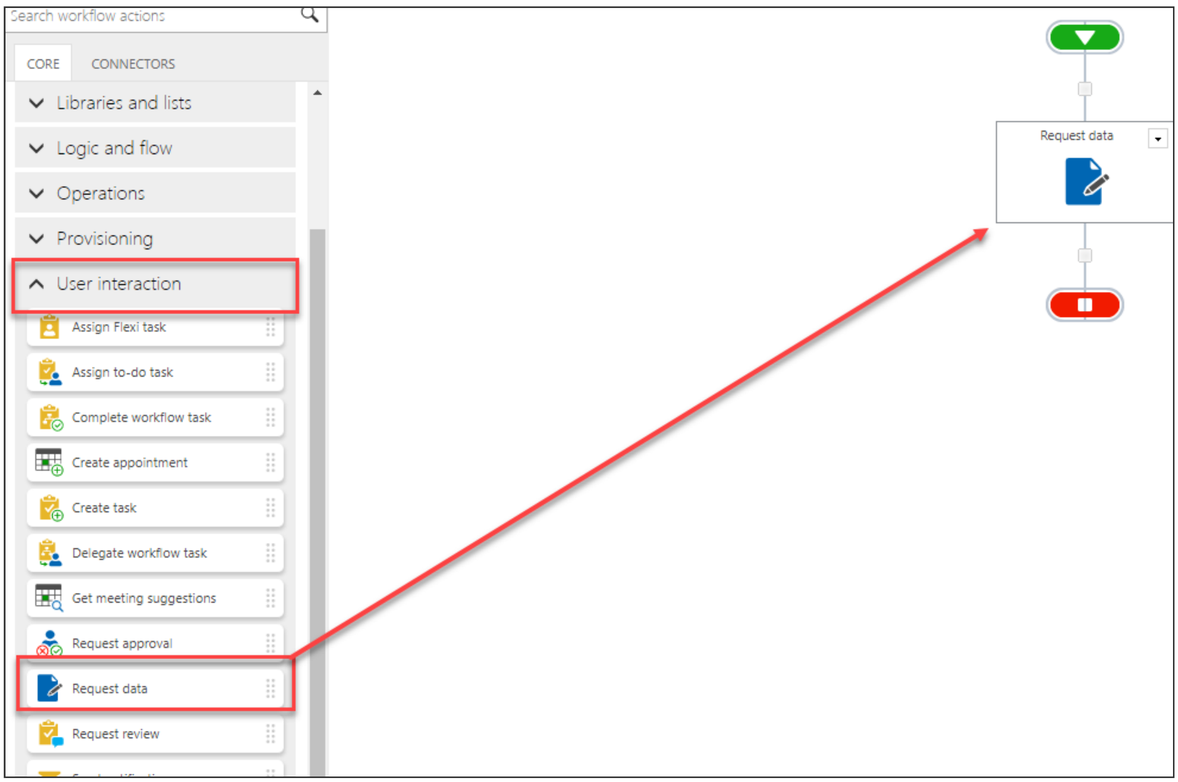
Requesting more data associated to a Nintex workflow

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.

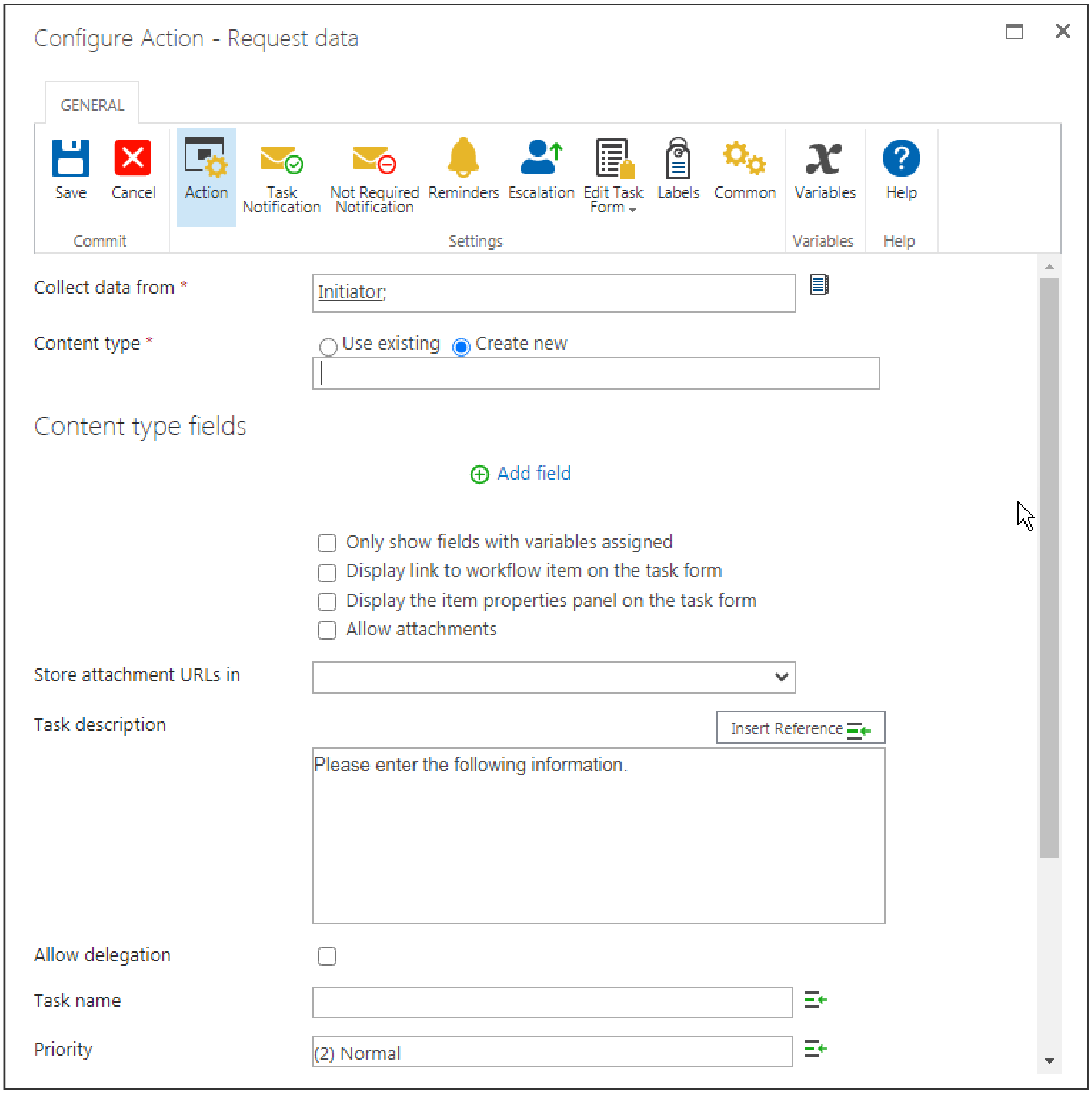
1. Navigate to the ***SharePoint*** list associated to the travel form. Click the **LIST** tab, click the down arrowhead (▾) on the **Workflow Settings** button, and then select **Create a Workflow in Nintex Workflow** on the menu.



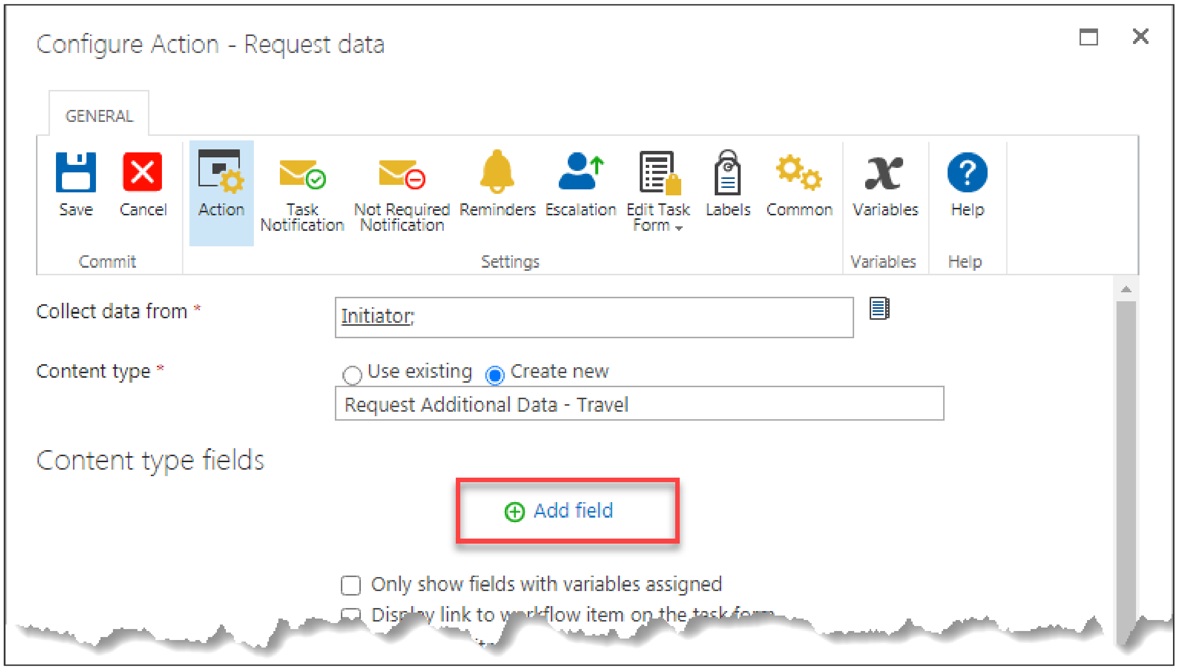
2. ***Nintex Workflow*** opens. Click the ∨ on the **User interaction** section of the Workflow toolbox. Click and drag the **Request data** action and drop it on a design pearl.



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

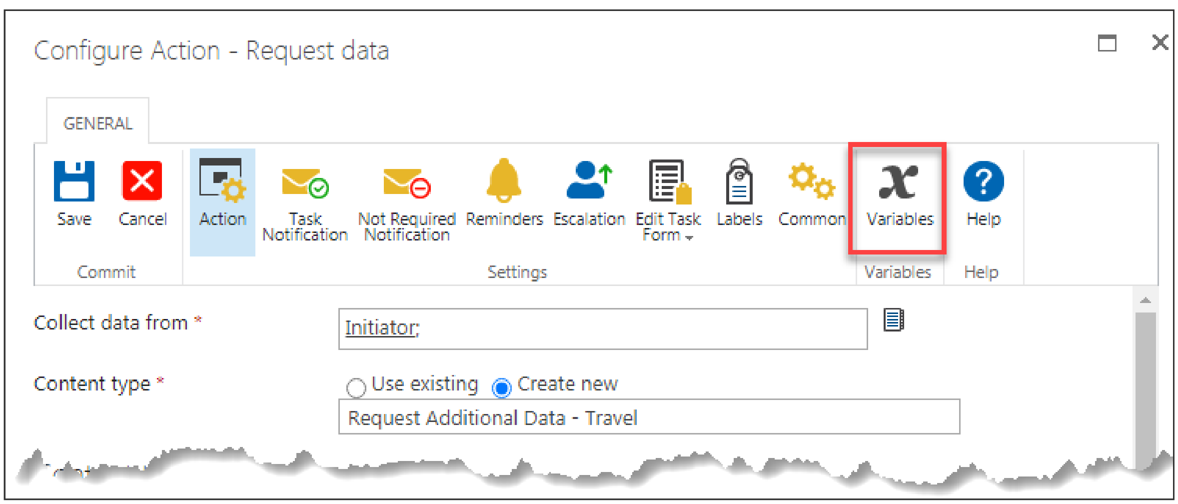


4. In the **Collect data from** field, enter the user email address, or user group. To access the People and Groups dialog, click the **Browse** (book) icon to the right of the field.
5. In the **Content type** field, select the **Create new** option. In the input field, enter a name for the content 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**.



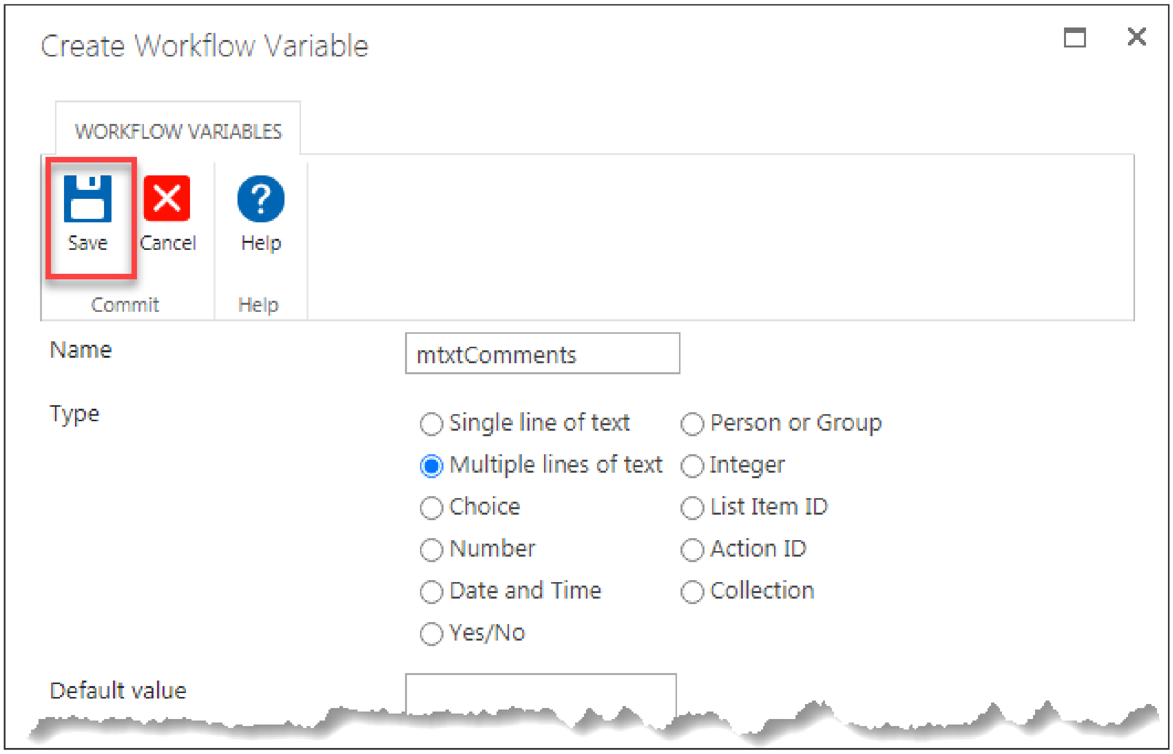
> **Note** — In the **Type** dropdown, you can see there is no option for a lookup field.

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**.

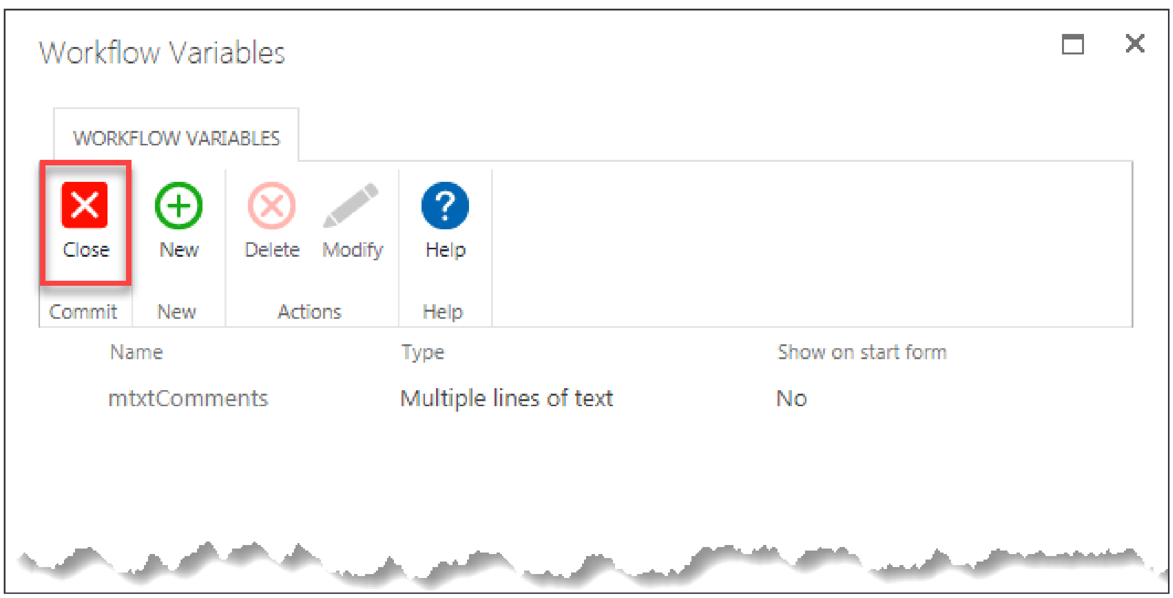


9. The Create Workflow Variable dialog appears. In the **Name** field, enter a name for the variable to store the results entered in the **Comments** field, such as **mtxtComments**.

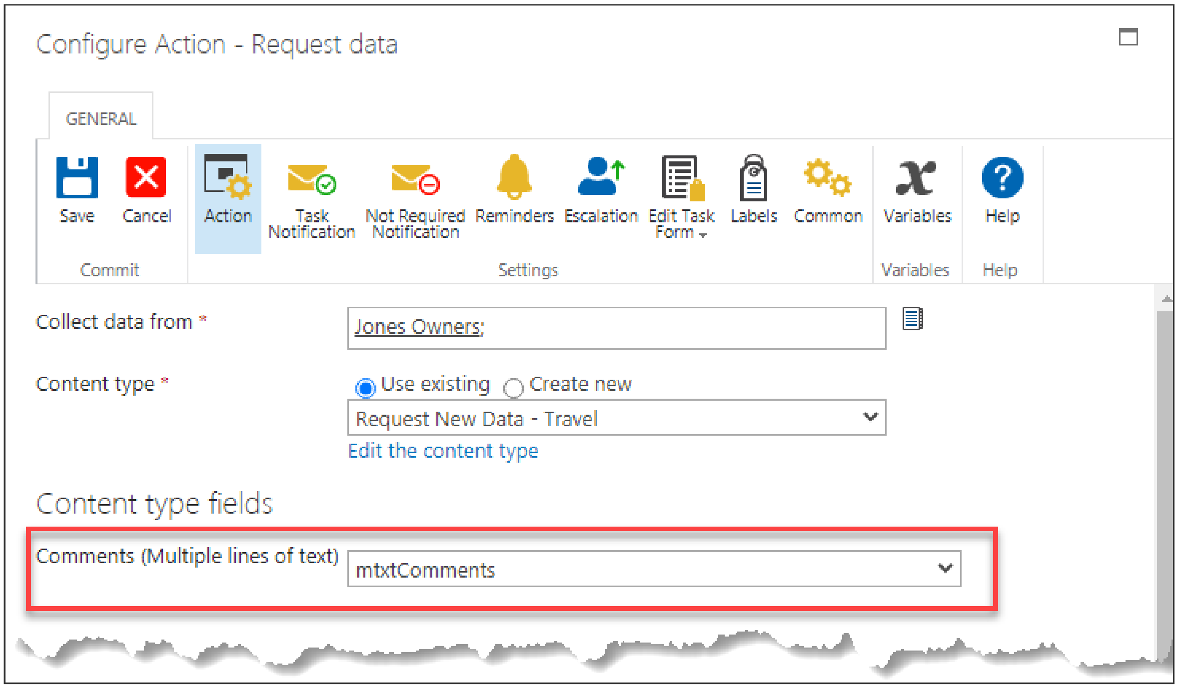
> **Note** — For variables naming convention, see KB article #119, What is the Collection operation.



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.



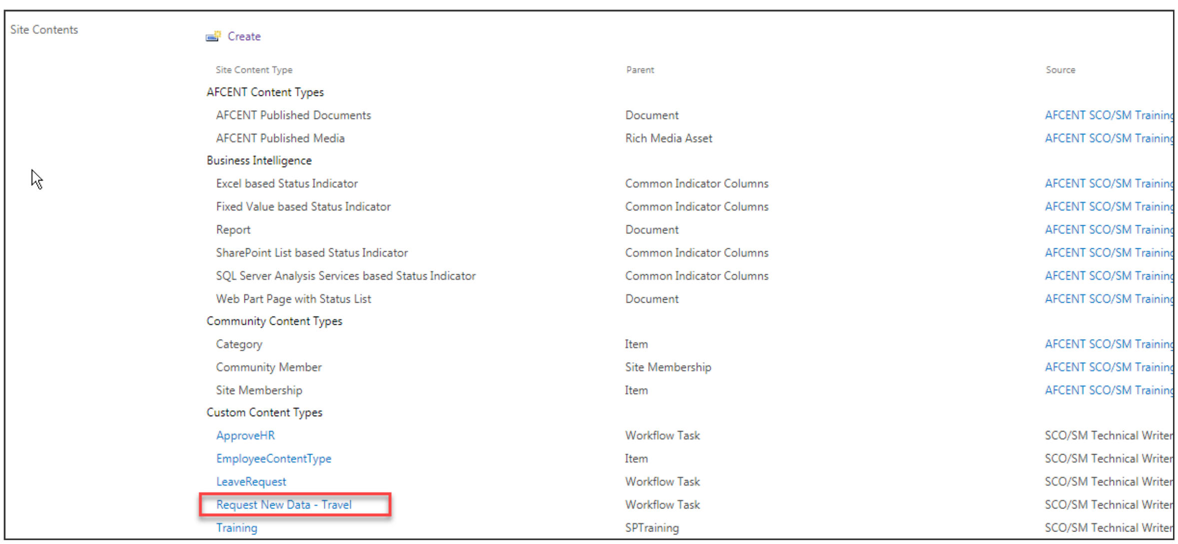
12. You are returned to the Configure Action - Request data dialog. In the **Comments** dropdown, select the variable you created in which to store the resutls, such as **mtxtComments**.



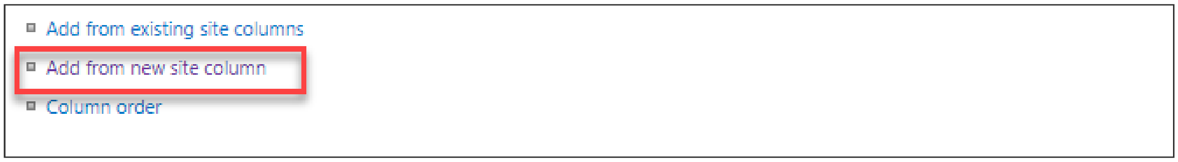
13. Click **Save** on the GENERAL ribbon to save your changes and close the Configure Action - Request data dialog.
14. **Save** and **Publish** your workflow.

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

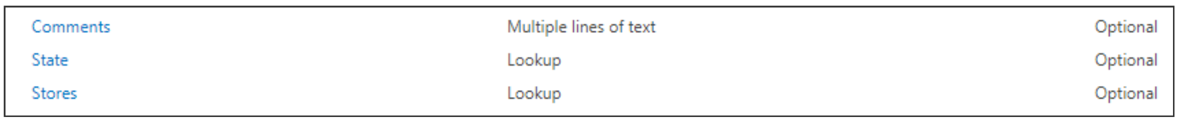
15. Navigate to the Site Settings ‣ Site Contents page and click the new content type hyperlink, such as **Request New Data - Travel**.



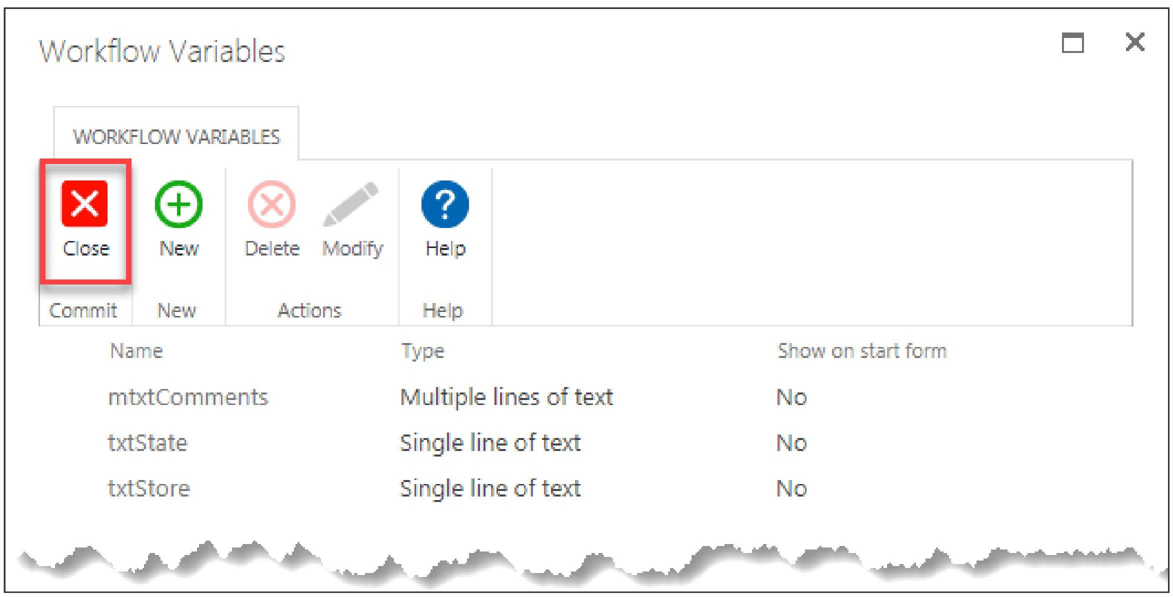
16. The Site Content Types ‣ Site Content Type page appears. Scroll to the bottom and click the **Add from new site column** hyperlink.



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.

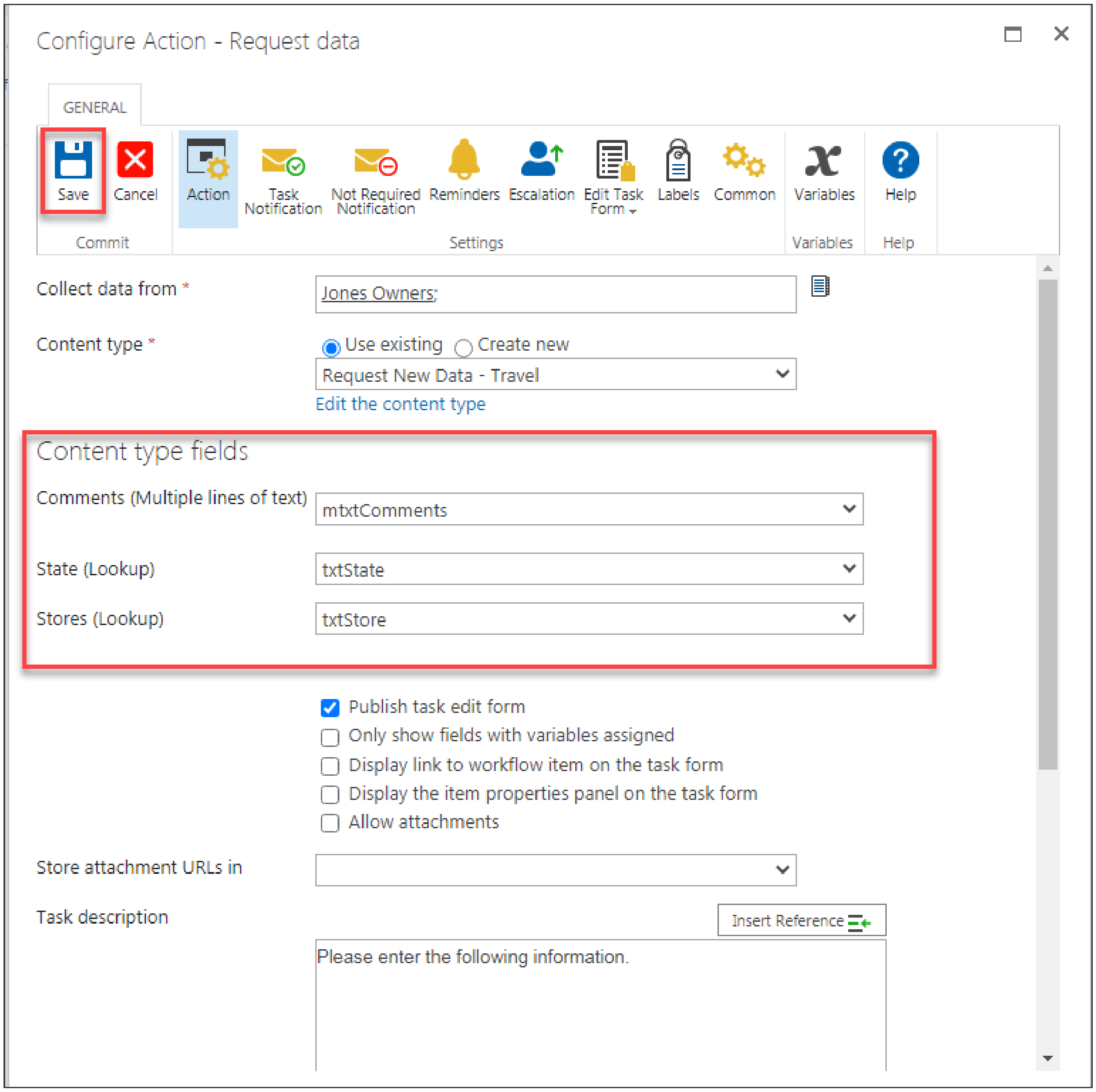


21. Navigate back to your ***Nintex*** workflow and create two **Single line of text** variables: one for the new **State** field resutls, such as **txtState**, and one for the new **Store** field results, such as **txtStore**.

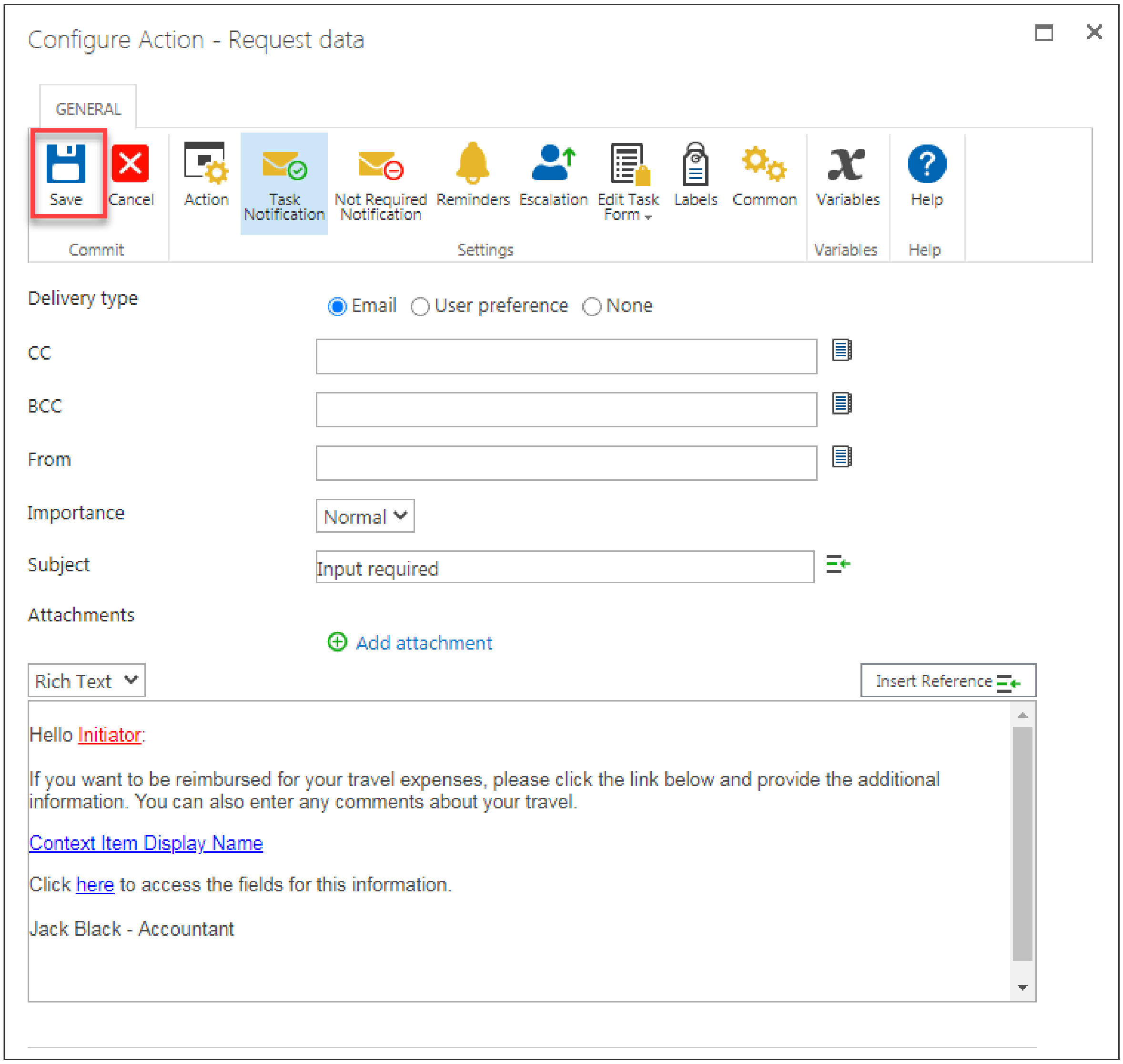


22. Save your changes and close the Workflow Variables dialog.
23. In the **State** (**Lookup**) dropdown, select the variable to store the results, such as **txtState**.
24. In the **Stores** (**lookup**) dropdown, select the variable to store the result, such as **txtStore**.

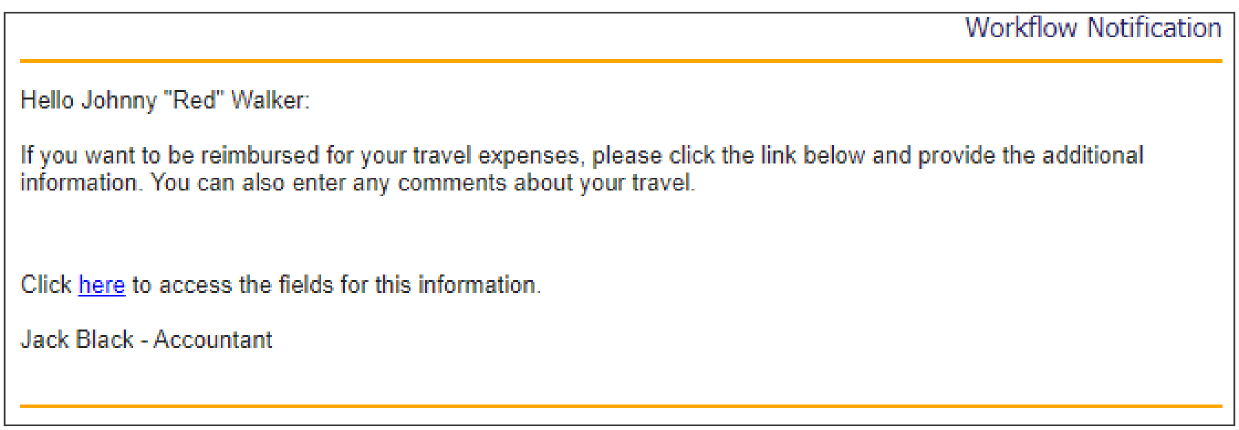
> **Note** — If the new fields do not appear in the **Content type fields** section, click the down arrowhead on the **Content type** dropdown (▾) and select another option, then reselect your new content type, such as **Request New Data** - **Travel**. This refreshes the Configure Action - Request data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



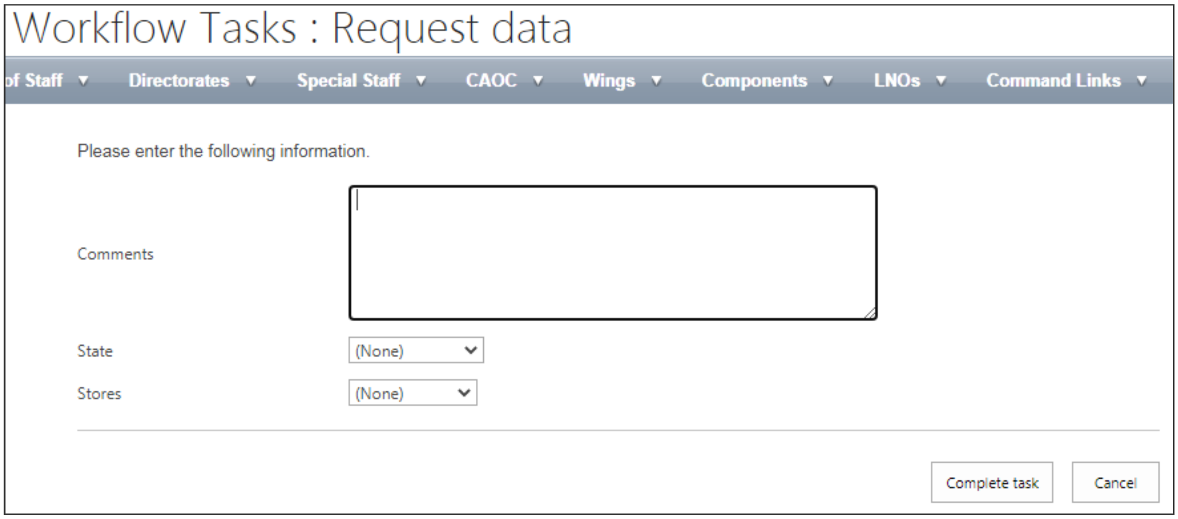
25. In the **Task description** field, enter a description for the task.
26. On the GENRERAL ribbon, click the **Task Notification** button. In the text field, enter a message about the additional request for data.



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.



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



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