

Bonus Issue

2

UNDERSTANDING SHAREPOINT JOURNAL

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Jim Bob Howard

# Collect Data Workflow

UNDERSTANDING SHAREPOINT JOURNAL

# SPD Best Practices: Collect Data Workflow

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*This issue is dedicated to my bride, Amy,  
and my precious children, Rowan, Tommy, Faith, and Charlotte.*

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# Credits

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## About *Understanding SharePoint Journal*

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You can read more about *USP Journal*, as well as get other issues and sign up for regular updates, discounts, and previews of upcoming issues, at <http://www.understandingsharepoint.com/journal>.

## Other Credits

A great big thanks to Kim Wimpsett for doing the copyedit. The quality of work in this issue is greatly attributed to her skill.






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# Exercises

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# Introduction

*Asking the right question at the right time to the right people can trigger a landslide.*

While following a thread on EndUserSharePoint.com's Stump the Panel forum, someone asked a great question.

Great Question:

“When using the Collect Data from a User action in a workflow, how does the workflow know which task list to assign the task to? Is there a way to specify which task list the task is created in?”

This was a question I myself had asked and searched high and low for the answer before discovering it through trial and error. To save others the pain, Bjørn asked me to write this bonus issue to share with the readers of *USP Journal*.

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## While You Wait

*Good things come to those who wait.*

Oftentimes, working with workflows involves creating items in other lists. In many of those cases, the workflow creates the item and moves on, receiving no information regarding the completion or status of the item it created.

One action, though, creates a task, assigns it to a user, and then waits until the task finishes; once complete, the information collected in the task is available to the action. That action is called Collect Data from a User. And since the action waits, the workflow then has access to the data that is collected in the task and can branch or perform other functions based on that data.

The form that is created to collect the data is a new content type based on the Workflow Task content type, so it inherits all the columns associated with a task, such as Assigned to, Due date, % Complete, Status, and so on.

But the Collect Data from a User action can be tricky to use, so I'll talk about all the finer points of using it in this issue...so you can answer that great question asked in the introduction.





## Before You Collect Data

Collect Data from a User puts the task it creates into the "first" task list, according to Microsoft. But which is first?

Microsoft means the first alphabetically. This is just like everything else in SharePoint; however, the workflow works with a GUID, so you can change the name of your list once you have everything flowing the way it should.

The time when your list has to be alphabetically first is when your workflow "compiles" for the first time and SharePoint creates your workflow task-based content type. At that point, the content type is connected by GUID to that task list, and you can change its name to whatever you want.

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I C O N   K E Y	
	Valuable information
	Test your knowledge
	Exercise
	Caution

But, it is also important to know that the first name you give something in SharePoint has lasting implications. Columns, lists, sites, workflows, and so on, will be named internally based on the name you give them at creation. And many times this name is used in a URL, or it is displayed as it was originally created and cannot be changed, so it is crucial to consider that even when creating a new content type via the Collect Data from a User action.

## A Tisket, a Task-et

Another convention to discuss before we get started is the issue of overlapping nomenclature. To add to the confusion, throughout this issue I will be referring to *tasks*, *lists*, *task lists*, the *Tasks list*, and *Tasks lists*. See? I told you it was confusing. Let's see if I can make it a little less confusing with some definitions:

- **list:** A SharePoint concept that can be seen in most cases as a table in a database. A library is a list of documents or forms or pictures, for example. You can create a list of announcements, contacts, and so on. There are also lists that help track certain types of information: a list of events is known as a calendar; a list of questions and answers is known as a survey.

In a like manner, a list of “things to do” is a task list. Since this is a very common use of lists, SharePoint created a content type that has most of the data someone would need to keep track of and called it...

- **Task:** A site-level content type definition. This content type is built in to a site-level list type named...
- **Tasks:** A type of list template that can be used to create a list instance to track content type items based on the site-level content type Task. This type of list is so common that a site receives one of these by default. SharePoint creates it automatically and calls it...
- **Tasks:** A default site-level instance of a list based on the standard Tasks list type. It tracks items that are based on the Task site-level content type.

For the most part, when say *Tasks list*, I mean this last definition: the default task list that comes with a site and is named Tasks. In most other cases, you will see the term *task list* (lowercase), which refers to any list based on the Tasks list template. To help minimize confusion, whenever possible, I refer to task lists by name: Tasks, WhileYouWait, Aardvark, and so on.

But when it comes understanding the type of lists that could be used by Collect Data from a User, it's important to understand that *Tasks lists* means any list based on the Tasks list template, including the one actually named Tasks.

## Collection Steps

So, come along, and I will walk you step-by-step through the best practices for creating a Collect Data from a User workflow.

Collect Data from a User creates a task in a Tasks list. Most SharePoint sites have a default list called Tasks that can be used for this purpose. If that works for you, skip to “Step 4: Open SharePoint Designer,” and also ignore steps 14 and 16, which refer to renaming the task list you would have created in steps 1–3.

On the other hand, if you want to have specific permissions on the task list you’re creating or a view of only this kind of task, then it would probably be helpful to create your own Tasks list to put your new content types in.

### Step 1: Create a Tasks List


The easiest way to create a new Tasks list is to click Create on the Site Actions menu. Then select Tasks under Tracking.

#### Note

You could also create your own Tasks list definition in Visual Studio or from a template. Both techniques are beyond the scope of this issue, but the naming conventions I discuss in this chapter will still apply. (See issue 5 of USP Journal for other ways to create lists and content types.)

<http://www.beginningsharepointdevelopment.com/>

Create your new task list with your desired final, nonspaced, URL-safe title. This will be used on creation to give your new list an easily identifiable “variable” name, which will also be used for the URL for the list. I will call mine WhileYouWait, as shown in Figure 1.

 **Creating  
the Task  
List**

#### Note

On creation, the name you give your list is its name from then on. This is also used as the display name. The display name is what is used in most cases where the list name is displayed; the name is used internally, as well as in URLs. I’ll cover exactly how those look and where they are used as we go along.

Naming my task list WhileYouWait on creation will make my URL <http://MySite/Lists/WhileYouWait/>.

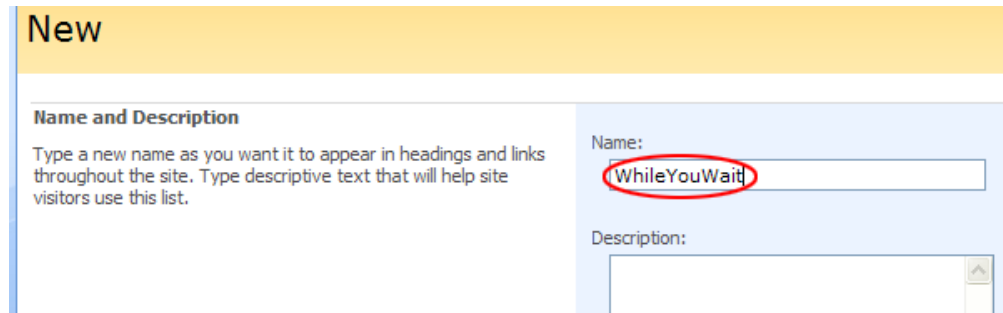


FIGURE 1. CREATING A NEW TASKS LIST

⌘ Tip

Even after you change the display name in a later step (see “[Step 14: Rename Your New Tasks List](#)”), the URL will still be in the format shown in Figure 2.

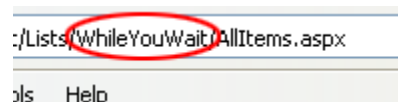



FIGURE 2. URL TO NEW TASKS LIST

🖥 Making the Task List “First”

### Step 2: Rename Your New Tasks List

Rename WhileYouWait so that is it first alphabetically. To make sure your list is first alphabetically, click View All Site Content, and scroll down to Lists. Tasks lists will be identified with the  icon. Pick a name that will come before all other lists that have that icon.

This name will be temporary, so it doesn’t matter what you name it as long as it is first, alphabetically, among all Tasks lists for the site. I temporarily named mine Aardvark and will refer to it as such to avoid confusion.

⌘ Tip

Renaming the task list *does not* change the URL or the internal name of the list. It does, however determine its place regarding which task list is first alphabetically.

1. To rename your new task list, select Settings → List Settings, as shown in Figure 3.

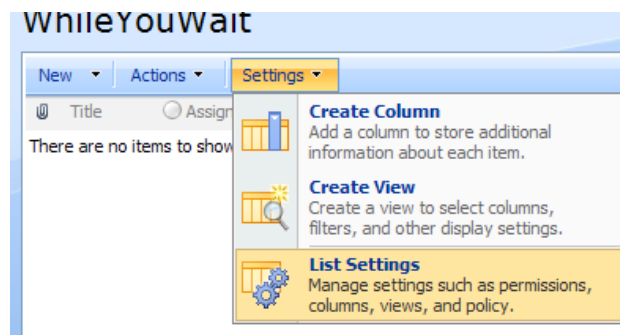


FIGURE 3. CHOOSING SETTINGS → LIST SETTINGS

2. Click “Title, description and navigation,” which will allow you to change the name of the list so that it will be first in the lineup, as shown in Figure 4.

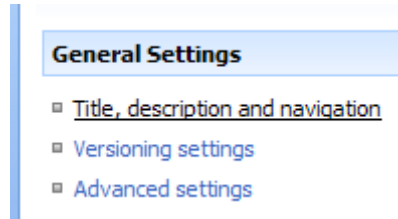


FIGURE 4. CUSTOMIZING LIST

3. Change the list name to be first alphabetically, as shown in Figure 5.

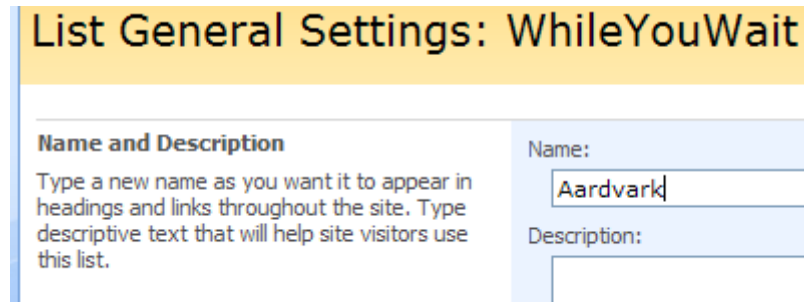


FIGURE 5. CHANGING THE LIST NAME TO BE FIRST ALPHABETICALLY

### Step 3: Create a Custom List

The workflow that creates the tasks that will go into the tasks list you just created must be attached to a list (or library), but you won't attach it to this newly created task list. Therefore, you will need to create another custom list or document library to which you will attach a workflow later.

It is completely up to you where this custom list goes and what it is called, but it needs to be on the same site as your task list so that we can associate the two with one another. I used a custom list and named it Wait List (actually WaitList, and then I renamed it Wait List).

## Working with SharePoint Designer

Now that our task list, Aardvark, is created and is first alphabetically ahead of all the other Tasks lists, you are ready to launch SharePoint Designer.

### Step 4: Open SharePoint Designer

In SharePoint Designer (SPD) 2007, open the site that contains Wait List and Aardvark (or whatever you named your custom list and task list). Select File → Open Site..., as shown in Figure 6, and select the site.

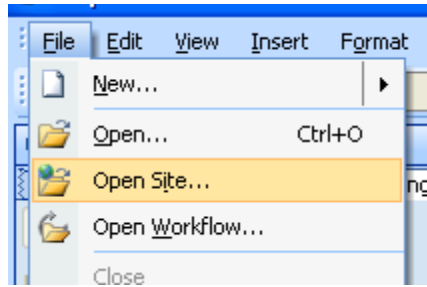


FIGURE 6. OPENING SITE IN SHAREPOINT DESIGNER 2007

### Step 5: Create a New Workflow

From the File menu, click the arrow next to New..., and then click Workflow, as shown in Figure 7. Your new workflow (and all subsequent workflows for this site) will be placed in a new directory titled Workflows.

 **Creating the Workflow**

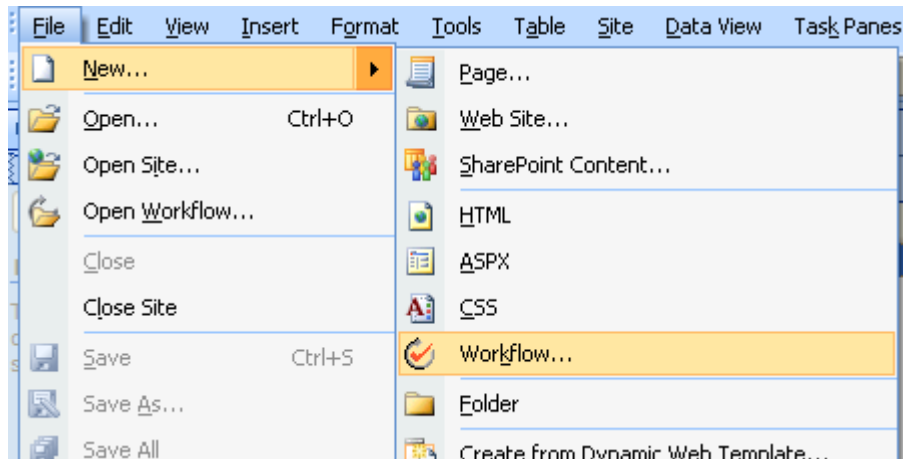



FIGURE 7. CREATING A NEW WORKFLOW

### Step 6: Name the Workflow

Give your workflow its “final” name. This will show up in a number of places, but the most prominent is as a column in your list if you choose to display your workflow status there.

 **Caution**

#### Caution

Though I am giving an example of a URL-friendly workflow name, read the following examples before you make your decision.

The name you give your workflow when it is created is the name that will be displayed as a label for the column showing the workflow status.

I used AddToWaitingList; compare Figure 8 with Figure 9, for example.

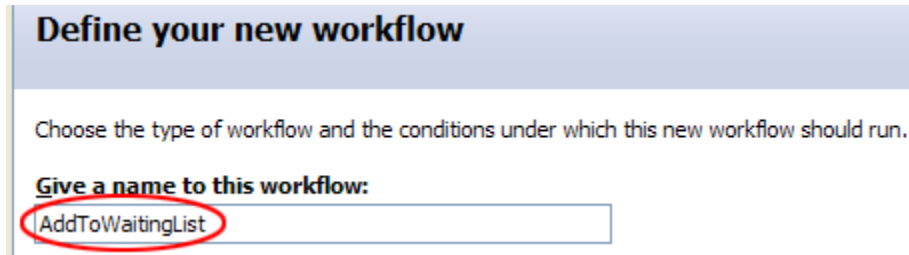


FIGURE 8. GIVING YOUR WORKFLOW ITS FINAL NAME

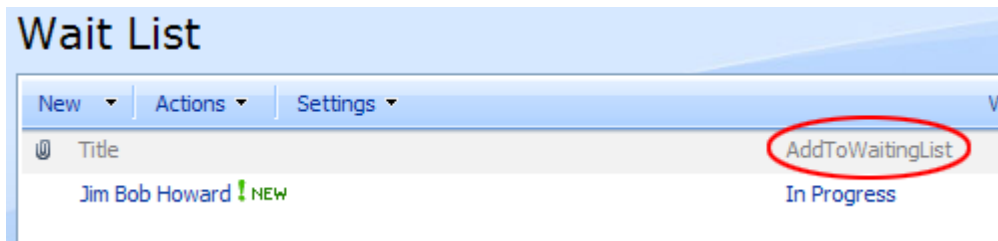


FIGURE 9. WORKFLOW NAME IN ALL ITEMS VIEW

But it also shows up in the URL when the user first goes to the data collection form, as in Figure 10.

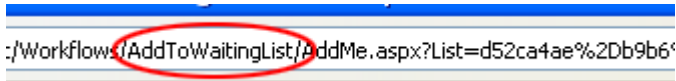


FIGURE 10. WORKFLOW NAME IN URL FOR DATA COLLECTION

It also shows up in the page title, as in Figure 11.



FIGURE 11. WORKFLOW NAME IN PAGE TITLE

You will have to decide which is more important to you. If you won't be displaying the status to your users, you might as well leave out the spaces so the URL looks good. If you'll be showing the workflow status to your users, you'll most likely want it "human-readable" but will sacrifice "easy" URLs in the process. It would be unusual for your users to need to type in the URL to a workflow page, so the sacrifice would be small.

 Caution

### Caution

When working with Collect Data from User, it is important that you do not rename your workflow if you have modified the collection form. There are several scenarios where SPD will re-create your collection form, erasing all of your changes. Renaming the workflow is one of them.

Another scenario is adding or modifying variables. My recommendation is to perform any form customization as the last step of the design process.

### Step 7: Associate the Workflow with the List

Be sure to associate your workflow with your new custom list, as in Figure 12, *not* your task list. When users create a new item in Wait List, your workflow will then create tasks to collect the data via Aardvark (which we'll later change back to While You Wait).

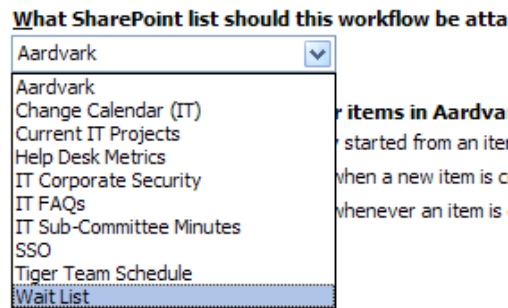


FIGURE 12. ASSOCIATING THE WORKFLOW WITH THE LIST

### Creating Content Types in a Workflow

### Step 8: Add the Collect Data from a User Action

Click the *data* link (see Figure 13) to start defining the data you want to collect. Just like creating a list with columns to collect data, you will be defining columns here for a new content type.

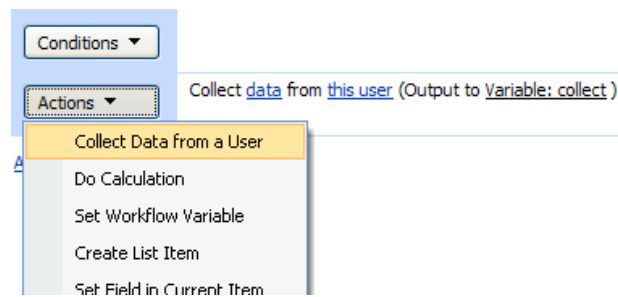


FIGURE 13. CHOOSING COLLECT DATA FROM A USER ACTION

## Step 9: Name Your Collection Forms

Since the Custom Task Wizard for Collect Data from a User defines a new content type, name your “collection form” (which becomes the name of the content type) with a nonspaced, URL-friendly title. It would not be unusual for users to need to type in the URL for your content type, so not having to use a “%20” for a space will make that a lot easier. Enter the name of your form in the name on the second page of the Custom Task Wizard for this action, as in Figure 14. Again, this title will be used to create the .aspx page and therefore will show up in a URL, so eliminate the “%20” from your URL by removing spaces on this title.

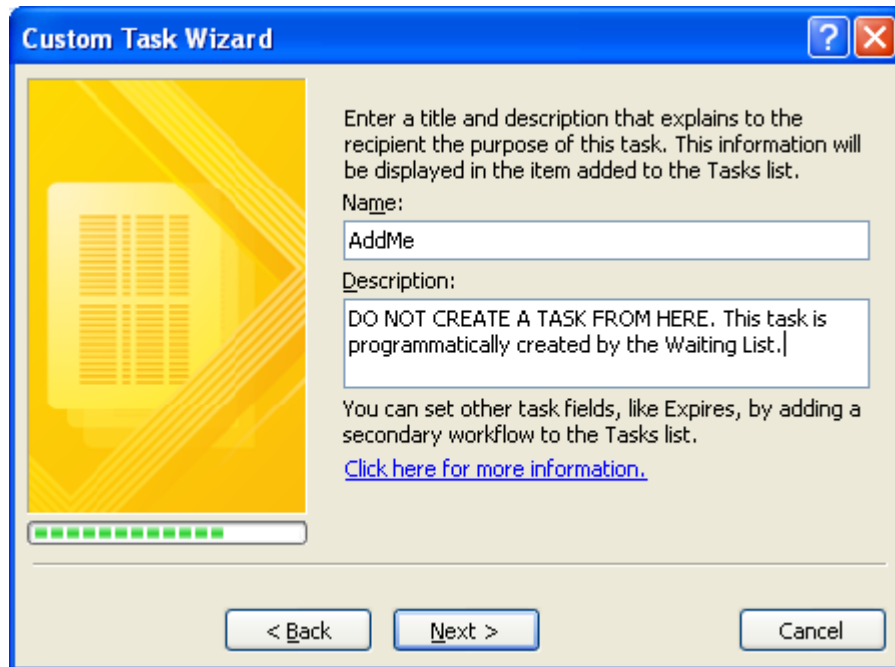


FIGURE 14. GIVING YOUR NEW CONTENT TYPE A URL-FRIENDLY NAME

See Figure 10 and Figure 11, both shown earlier, for a view of how this name will show up in page titles and URLs. Once created in SharePoint Designer, however, you can change this name in SharePoint through the browser (see “Step 15: Rename Your New Content Type”).

**Tip**

It is good practice to include a note in your description telling the user not to create a task directly in your task list (Aardvark), because Wait List will not know anything about tasks created here.

**Note**

An even better approach might be to hide the content type altogether. You can accomplish this with SharePoint Manager (SPM) 2007. Using

SPM 2007, browse to your list, open your Content Types node, find your content type, and change the Hidden property in the Properties pane to True.

You can get SharePoint Manager 2007 for free on CodePlex at <http://www.codeplex.com/spm>.

#### Use of Content Type's Internal Name

One place the name you choose here will always show up (even after you rename your content type in step 14) is in the Title column of the task that is created by the workflow (Figure 15).

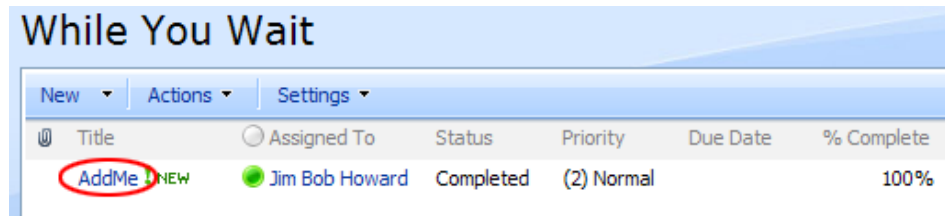


FIGURE 15. BY DEFAULT, THE TITLE OF TASK IS ITS SITE CONTENT TYPE'S INTERNAL NAME.


Having the title of the task set to the internal name of the content type probably isn't very useful in practice, so I recommend you change it via an SPD workflow to help identify it with the list item that created it. (See "Once More in SharePoint Designer Optional Step 1: Change Task Title" for details.)

#### Step 10: Add the Columns You Want to Collect

Collection form columns are very similar to the columns available when creating a list in SharePoint, with only a few differences, which will be obvious for the most part. Add as many columns as you would like here. But remember two things:

- Whatever name you give each column will become the name of a site column and your list column. If you plan to reuse the site column, plan your column names accordingly. Also, as with everything else in SharePoint, you can change the display name later, but the internal name will stay as created, based on the name you give it here, which in turn will have repercussions on URLs.

- If you've edited the collection form .aspx file in the workflow's subdirectory, adding columns through the Custom Action Wizard will cause your changes to be overwritten as SPD re-creates the page. However, you can still change the names of columns and even add new ones to the content type through your SharePoint site.

 Caution

#### Caution

As of this writing, field validation for required Choice columns created in the Collect Data from a User action doesn't work.

### Step 11: Assign the Task

Your task can be assigned to any Windows user or a user in the Active Directory, or it can be chosen from your Current Item or Workflow data. You can assign a task only to one person, though, and not to a group. To assign a task to others, use the Collect Data from a User action again. Each one will create a new content type, however.

Click “this user” to choose a person to assign the task to.

### Step 12: Store the ID of the New Task

One last item to set is the workflow variable that will store the ID of the task created by the Collect Data from a User action. Click “Variable: collect,” and create a field to hold the task ID. With this variable available, you can use later workflow actions to access data in the task once it is completed.

You might have a conditional step that checks for “Approved” or “Rejected” and performs different tasks depending on what it finds. Or you might store the ID in the list item to be able to connect the two later.

### Step 13: See What Happens After You Click Finish

Click Finish to complete the creation of your workflow. SharePoint Designer does several things for you at this point:

- Creates a new site content type and site columns (to see site content types, go to Site Actions → Site Settings, and click “Site content types” under Galleries, as shown in Figure 16).

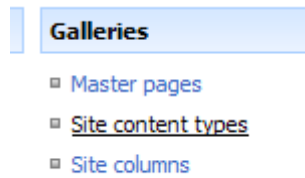


FIGURE 16. COLLECT DATA CREATES A SITE CONTENT TYPE.

Your new content type will automatically be added to the Custom Content Types group, as shown in Figure 17. Notice its parent is Workflow Task.

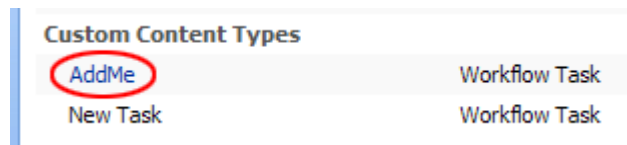


FIGURE 17. A NEW CUSTOM CONTENT TYPE

- Creates a List Content Type, as shown in Figure 18.

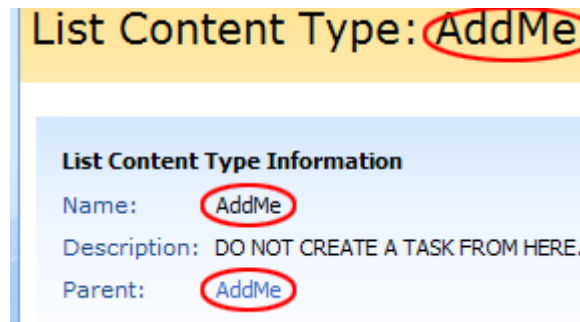


FIGURE 18. A NEW LIST CONTENT TYPE

Notice that the List Content Type is an instance of the Site Content Type of the same name.

The hierarchy is as shown in Figure 19.

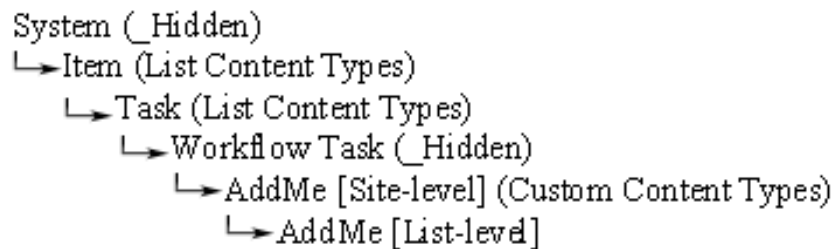


FIGURE 19. CONTENT TYPE HIERARCHY

## Reusing Content Types and Site Columns

The site-level custom content type created by Collect Data from a User is not reusable via another Collect Data from a User.

Any site columns created, however, are reusable in other content types, even in another Collect Data from a User action, provided they are added from SharePoint after the content type has been created upon clicking Finish in the workflow wizard in SPD.

- Adds the new list content type to the “first” Tasks list, as shown in Figure 20.

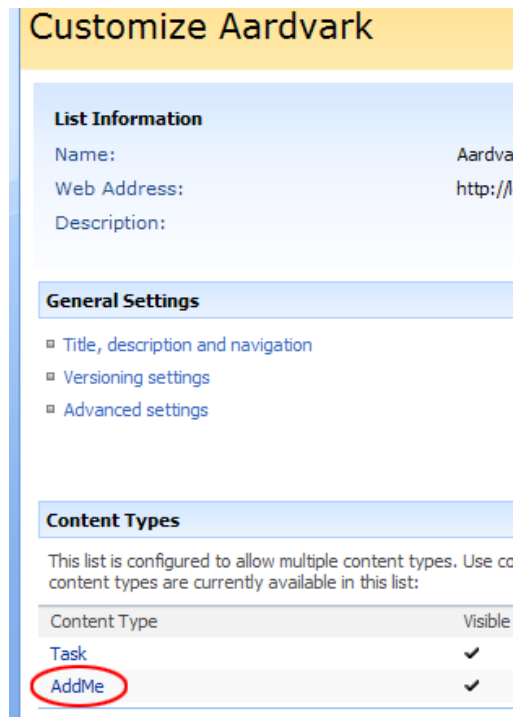


FIGURE 20. CONTENT TYPES MANAGEMENT IS TURNED ON AUTOMATICALLY.

- Creates a data collection form (in the Workflows directory), as shown in Figure 21.

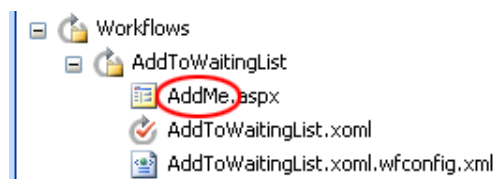


FIGURE 21. ADDME.ASPX WILL BE USED TO COLLECT DATA.

- Associates EditForm.aspx for that content type to redirect to this data collection form, as shown in the following example

#### Example

...YourSite/Lists/WhileYouWait/EditForm.aspx?ID=1 redirects to  
...YourSite/Workflows/AddToWaitingList/AddMe.aspx?ID=1.

## Meanwhile, Back in SharePoint

### Step 14: Rename Your New Tasks List

If you created a new task list, as stated earlier, changing the name won't mess up anything since the content type created by the workflow is tied to your new task list's GUID. And once your new task content type (for example, AddMe) has been associated with Aardvark, you will want to rename the list to something useful, such as While You Wait.

Of course, if you are using the default Tasks list, you can skip to the next step, "Step 15: Rename Your New Content Type."

To change the name of Aardvark, go to the list on SharePoint, and select Settings → List Settings; then click "Title, description and navigation," as shown in Figure 22.

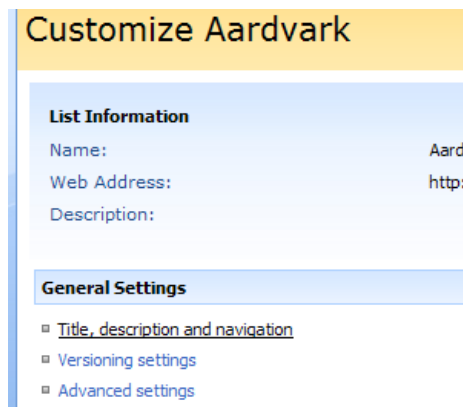
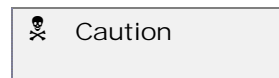


FIGURE 22. RENAMING YOUR TASK LIST



Renaming  
the Task  
List



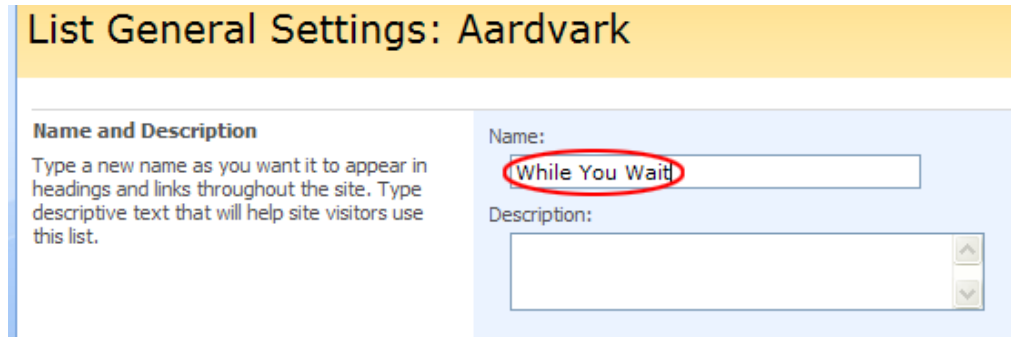
Caution

#### WARNING

Anything that changes the name of the content type from the workflow will break all of this, re-creating the content types in the "first" Tasks list again, and you will need to start over. As long as you leave the

name the same, however, even if the collection forms are re-created, your content types should be safe in your new Tasks list.

Change the name of Aardvark, as shown in Figure 23, this time making it the display name you want to present to users.



**List General Settings: Aardvark**

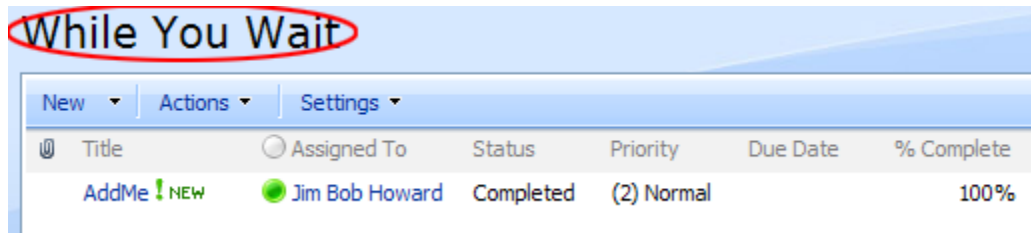
**Name and Description**  
Type a new name as you want it to appear in headings and links throughout the site. Type descriptive text that will help site visitors use this list.

Name:

Description:

FIGURE 23. RENAMING YOUR TASKS LIST IN LIST GENERAL SETTINGS

Your new name will appear whenever a list or item of that content type is displayed, as shown in Figure 24.



**While You Wait**

Title	Assigned To	Status	Priority	Due Date	% Complete
AddMe ! NEW	Jim Bob Howard	Completed	(2) Normal		100%

FIGURE 24. YOUR TASKS LIST NAME ON ALL ITEMS LIST

It will also appear in the Quick Launch list similar to Figure 25.

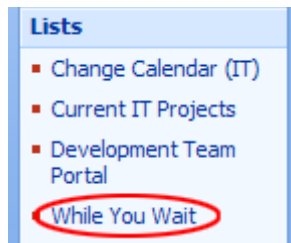


FIGURE 25. YOUR TASKS LIST NAME IN QUICK LAUNCH

However, since we first created this list without spaces (in “Step 1: Create a Tasks List”), the URL for the list will still resemble Figure 26 (which is the same as Figure 2).

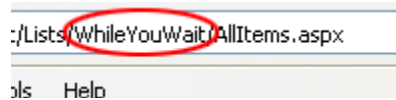


FIGURE 26. URL TO NEW TASKS LIST (SAME AS FIGURE 2)

### Step 15: Rename Your New Content Type

⌘ Tip

Once SharePoint Designer has associated your workflow with your new content type and associated your new content type with your new task list, you can safely rename your content type so that it is more “human-readable.”

1. From While You Wait (if you’ve been using the same names I have), select Settings → List Settings. Here you can click the name of your new content type, as in Figure 27.

⌘ If the Content Types section isn’t visible, click Advanced Settings, and set “Allow management of content types?” to Yes.

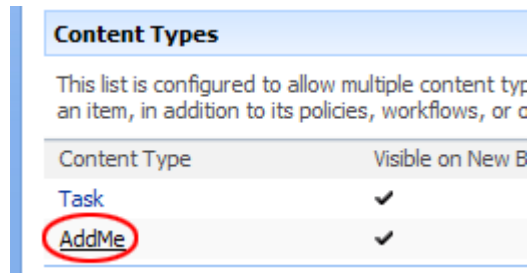


FIGURE 27. CHOOSING YOUR CONTENT TYPE FROM THE LIST

2. Click Name and Description under Settings (see Figure 28).

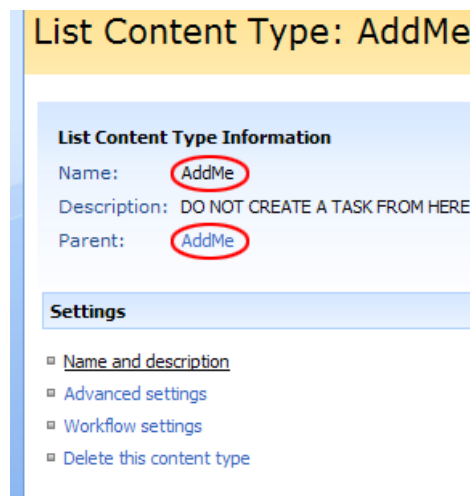


FIGURE 28. LIST CONTENT TYPE CONFIGURATION

3. Whatever you change the name to here (as shown in Figure 29) will show up under the New menu in While You Wait, as shown in Figure 32 (unless you hide the content type with SharePoint Manager 2007, as mentioned in “Step 9: Name Your Collection Forms”).

**List Content Type Settings: AddMe**

Use this page to change general settings for this content type.

**Name and Description**

Type a name and description for this content type. The description will be shown on the new button.

Name: Add Me

Description: DO NOT CREATE A TASK FROM HERE. This task is programmatically created by the Waiting List

Parent Content Type: AddMe

FIGURE 29. CHANGING THE NAME TO SOMETHING “HUMAN-READABLE”

The Description field is displayed with the name under the New button. Since you are creating this type of task programmatically, I recommend you include “DO NOT CREATE A TASK FROM HERE” in the description and then explain to the user where to go to start the process that will create a task here.

#### Creating a New Task from the Tasks List

Creating a task here doesn’t have to be completely forbidden, of course. But, any task manually created from the task list itself will be orphaned from the list whose workflow created this content type.

#### Step 16: Remove the Task Content Type

Even though you won’t be creating tasks directly from your new task list, it is still a good practice to remove content types you won’t be using. Since this is a Tasks list, a list-level instance of the site content type, Task, is automatically added to the list. This task could be confusing to users and should be deleted. (Again, if you are not using a new task list that you created, you can skip to “Optional Step 1: Change Task Title (Recommended).”)

1. Click Task under Content Types, as shown in Figure 30.

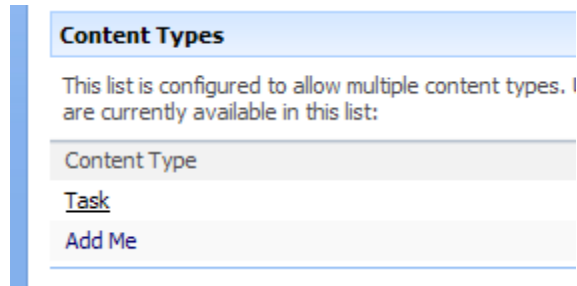


FIGURE 30. THE TASK CONTENT TYPE IS UNNEEDED.

2. Click “Delete this content type” and then OK, as shown in Figure 31. This action will remove it only from this specific Tasks list, not from the site content types.

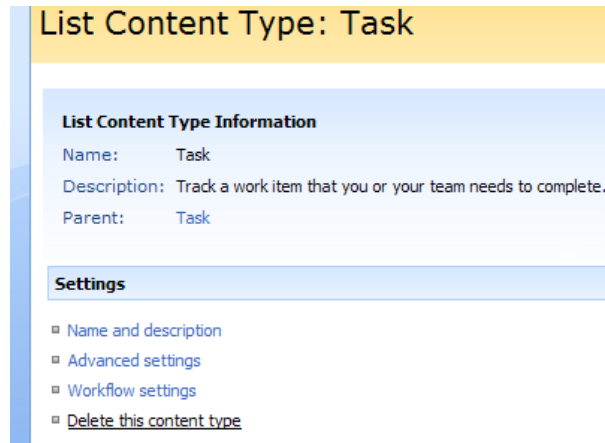


FIGURE 31. DELETING THE LIST CONTENT TYPE

Once the Task content type has been removed, the only task available under the New menu is the one we created. Notice in Figure 32 that the description of the list content type is displayed here to discourage users from creating an orphaned task independent of the list (Waiting List) that is using this task list (While You Wait) to collect data from a user.

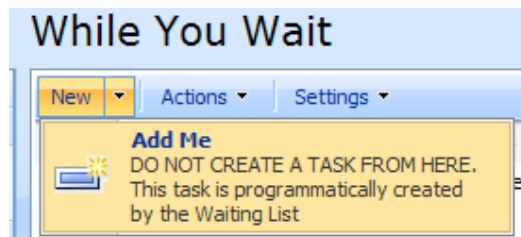


FIGURE 32. ADD ME CONTENT TYPE VISIBLE UNDER THE NEW MENU

## Once More in SharePoint Designer

### Optional Step 1: Change Task Title (Recommended)

As noted in “Step 9: Name Your Collection Forms,” having the title of the task set to the internal name of the content type probably isn’t very useful in practice. If that is the case in your situation, I recommend taking one more optional step, as shown in Figure 33.

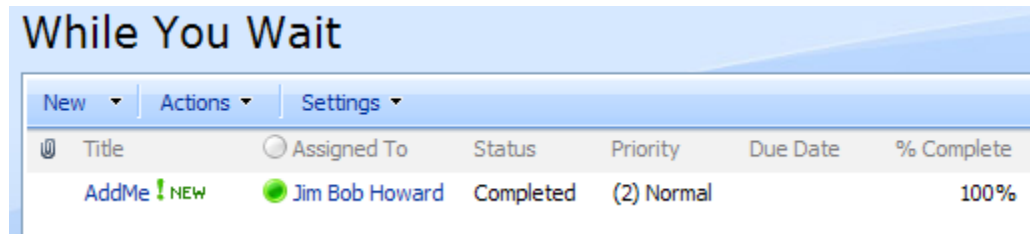



FIGURE 33. SITE CONTENT TYPE INTERNAL NAME BECOMES THE TASK TITLE


Using an SPD workflow, you can update the Title column to help identify it with the list item that created it.

 Test Your Knowledge

Can we update the Title name of the task in the same workflow as the Collect Data from a User action?

No, we can’t update the title of the task from the same workflow as the Collect Data from a User action because Collect Data from a User pauses the workflow until the user clicks Complete Task, which may be days, weeks, or even years!

And, assuming the user would benefit from having some identifying information from the creating list item, it would be better to have the title updated right away.

 Test Your Knowledge

So, what kind of workflow should we create? And what list should it be associated with?

Right! We need a “create” workflow on While You Wait. Go to the head of the class.

So, how do we access data from the creating list to store in the created task?

Notice in Figure 17 that the parent of our site content type, AddMe, is Workflow Task. If you were to create this content type directly from a Tasks list, its parent would be Task, but since it was created by Collect Data from a User, it is a Workflow Task and has a couple of hidden columns that you now have at your disposal when working with the current item in a workflow. This is *great news!*

What’s so great about it? I’ll tell you.

One of the columns is Workflow Item ID, which—fortunately for us—is the ID of the item from Waiting List whose creation triggered the workflow that performed the Collect Data from a User action that created the task we’re working with in While You Wait. That means we can use the Update List Item action to update the Waiting List item whose ID is equal to the Workflow Item ID of the Current Item in While You Wait.

1. In SharePoint Designer 2007, create a new workflow following the previous steps 4–7 to initiate a “create” workflow on your While You Wait.
2. To update the Title column in your task, select the Set Field in Current Item action, as in Figure 34.



FIGURE 34. CHOOSING SET FIELD IN CURRENT ITEM ACTION

3. Click “field,” and select Title from the drop-down list.
4. Click “value” and then the fx button to open the Define Workflow Lookup Wizard, as shown in Figure 35.
5. In the Source drop-down box, change Current Item to your list (for example, Waiting List).

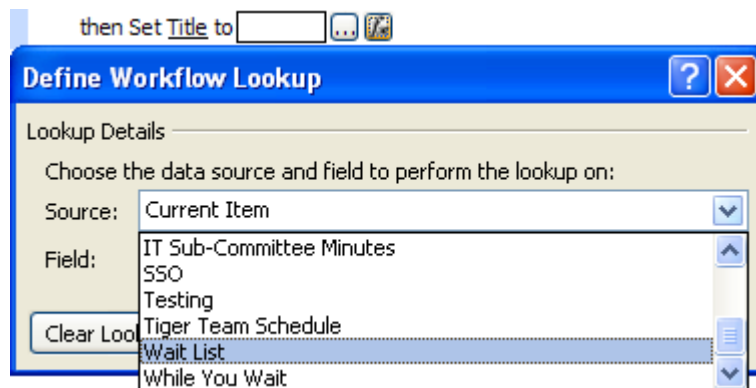


FIGURE 35. DEFINING THE LOOKUP FOR VALUE

6. Once you choose something other than Current Item, the wizard will add the Find the List Item section at the bottom, as shown in Figure 36.

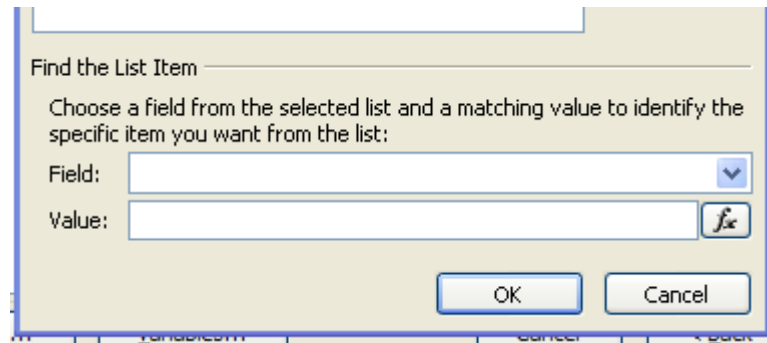


FIGURE 36. FIND THE LIST ITEM

In SQL terms (which reads very much like English), this bottom part is defining the WHERE clause of an UPDATE sentence:

```
UPDATE {field} = {value} WHERE {Field} = {Value}
```

In our case (see Figure 37), {field} is the task's Title column, as chosen from the drop-down box in step 3. {value} is going to be the Waiting List item's Title column, and the WHERE clause is going to say WHERE the ID of the Wait List item is equal to the Workflow Item ID of the While You Wait task:

**field** = While You Wait.Title

**value** = Wait List.Title

**Field** = Wait List.ID

**Value** = While You Wait.Workflow Item ID

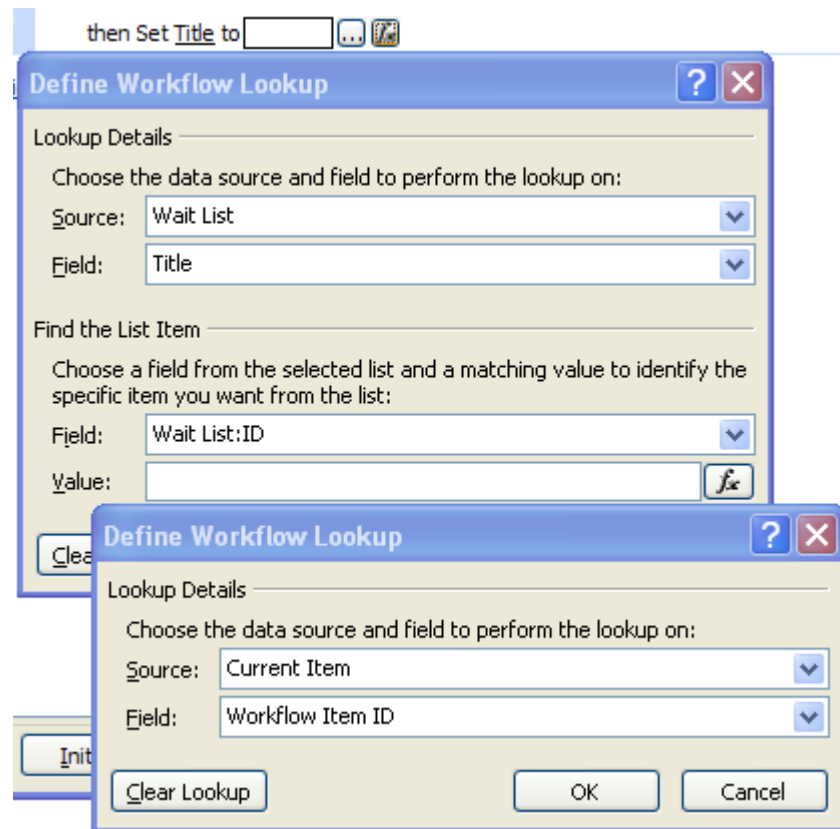


FIGURE 37. ITEM ID EQUALS TASK WORKFLOW ITEM ID

- a. For Source, select Wait List.
- b. For the top Field, select Title.
- c. For the bottom Field, select Wait List:ID.
- d. For Value, click the *fx* button, which will open the Define Workflow Lookup dialog box.

In this dialog box, leave Source set to Current Item. In Field, select Workflow Item ID.

Click OK twice.

7. Click Finish.

## Final Thoughts and Additional Resources

*Never stop learning.*

This is not the end of what can be said about Collect Data from a User, content types, task lists, or workflows. It's just the end of the line for this part of the discussion.

You could use this for creating approval workflows, gathering signatures, collecting recommendations from colleagues, or creating an internal hiring process to route information from a current manager to a hiring manager. You name it.

**How else might you use this information? How have you used it? We want to hear from you. What questions do you have that you would like to see covered in an upcoming issue of *USP Journal*?**

Leave comment on my blog (<http://billyjoejimbob.blogspot.com>), ask me a question on EndUserSharePoint.com's Stump the Panel (<http://www.endusersharepoint.com/STP>), or send suggestions topic suggestions to Bjørn at [furuknap@gmail.com](mailto:furuknap@gmail.com). You can also reach each of us on Twitter: @furuknap and/or @jbhoward (guess which is which).

To get information about the upcoming issues of *USP Journal*, make sure you sign up for the mailing list on the *USP Journal* website, <http://www.understandingsharepoint.com/journal>. Members of the list receive special offers, discounts, and previews of new issues.

You may also want to check out Bjørn's book *Building the SharePoint User Experience*, which deals with every aspect of the user experience, including a thorough understanding of the SharePoint architecture. You can read more about the book on <http://www.understandingsharepoint.com/userexperience>.

Finally, check out Bjørn's blog at <http://www.understandingsharepoint.com/url/1000>, where you will find shorter articles, tips, questions and answers, and downloadable content.

Thank you for reading this bonus issue, and I hope to see you again soon,

Jim Bob

## Previous *USP Journal* Issues

*What you have missed so far but can still get from our website.*

### Issue 1: SPCurrentUsers Explained

This issue deals with the solution SPCurrentUsers available from CodePlex and covers the following main topics:

- DelegateControls
- CustomAction, both CAML-based and Assembly-based
- Custom application pages in SharePoint, using code-behind files
- List deployment and column manipulation
- Solution setup using SharePoint event receivers

URL: <http://www.understandingsharepoint.com/journal/volume-1/issue-1>

### Issue 2: Developing SharePoint Content Types

If you want to learn everything about developing SharePoint content types, you should get your hands on issue 2, covering the following:

- Content type introduction
- Visual interface using FormTemplates
- Inheritance
- Behavior using event receivers
- Content types as folders
- Custom XmlDocument solutions

URL: <http://www.understandingsharepoint.com/journal/volume-1/issue-2>

### Issue 3: SPTags Explained

If you have ever tried to build custom field types in SharePoint, you definitely want to pick up issue 3, covering the following:

- Custom field type development
- SharePoint Web part development
- Custom page development

- Custom web part properties
- Field type custom property storage

URL: <http://www.understandingsharepoint.com/journal/volume-1/issue-3>

#### Issue 4: SharePoint Designer Workflow

In issue 4 of *Understanding SharePoint Journal*, you will learn how to create workflows in SharePoint Designer. The issue covers the following:

- Workflow in a nutshell
- SharePoint Designer workflow activities
- Workflow branching
- Working with variables
- Loops in SharePoint Designer workflows

URL: <http://www.understandingsharepoint.com/journal/volume-1/issue-4>

#### Issue 5: Beginning SharePoint Development

Issue 5 introduces you to development for SharePoint. You will learn the basics of various SharePoint development techniques, including the following:

- Setting up your development lab
- Using Collaborative Application Markup Language
- Using the SharePoint object model
- Creating features and solutions from scratch
- Using event receivers and workflow
- Working with web parts

URL: <http://www.understandingsharepoint.com/journal/volume-1/issue-5>

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