

## SharePoint: Using Multiple Forms in a Single List

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Using lists in SharePoint is a great tool that allows users to submit items such as work requests or provide feedback. You can configure columns within the list for fields that you want users to complete for their submissions. However, managing the item itself typically requires more fields than the user needs to see. There are many ways that you can solve this, whether it be development work or a simple workflow to move the item from one list to another.

One way to solve this issue without requiring any customization, development work or building a workflow is to take advantage of SharePoint's Content Types. By using Content Types inheritance, we are able to build a simple form for the user to submit their information and then a more detailed form for those managing the requests. For example, users of a particular SharePoint environment may want to submit changes they would like to see done on their sites. These submissions would come into an IT department and be assigned to a particular person for completion. The below steps will walk you through creating multiple forms with Content Types.

### Step 1: Plan Fields for Each Form

For each form, plan which fields are needed and what type of data will be stored in those fields. For example, 'Request' may be a field that is multiple lines of text for the user to describe their request. Requested By is already captured in the Created By column as well as the date in the Created column.

### Step 2: Create Site Columns

Since we will be using Content Types to provide the two different forms, one for submitting and one for managing the request, we will need to start by creating our site columns by navigating to Site Settings and clicking on Site Columns. Assigned To could be used from the core task site columns or you could create your own. I would suggest creating a new group for each form so that you can easily populate them into the Content Type. Then group all of the submission columns into the Form Submission Group and the Management of Request into another group.

### Step 3: Create Submission Content Type

Now that we have our site columns, we can create the first Content Type for the submission form. In Site Settings, go to the Content Type gallery and click Create. Here you will indicate that you want to create a Content Type based on the Lists group and Item parent. Provide your new Content Type with a title and description and then add the site columns for the submission only.

Name: Request Submission

Description: Submit requests for work to be done on your current site.

Parent Content Type:

Select parent content type from: List Content Types

Parent Content Type: Item

Description: Create a new list item.

Put this site content type into:

Existing group: Custom Content Types

New group: IT Department Content Types

OK Cancel

#### Step 4: Create the Item Management Content Type

Next you will create another new Content Type just as you did above, however this time you will not inherit from Lists/Item, you will inherit from your freshly created Submission Content Type. Provide the title and description and then add in the additional site columns specific to managing the submissions.

Name: Manage Work Request

Description:

Parent Content Type:

Select parent content type from: IT Department Content Types

Parent Content Type: Request Submission

Description: Submit requests for work to be done on your current site.

Put this site content type into:

Existing group: IT Department Content Types

New group:

OK Cancel

The title will remain as is and be incorporated into your list. Changes to this label would not be done from within the Content Type. You will want to modify this from within the list itself.

## Step 5: Create List & Configure for Content Types

Now that you have your Content Types, you can either create a new custom list or use an existing list. Go to the List Settings and click on Advance Settings from within the General section. At the top in the Allow Management of Content Types section, click Yes. When you click OK, a new section will appear on the List Settings page called Content Types.

The screenshot shows the 'List Settings' page with the 'Advanced Settings' section expanded. The 'Content Types' section is visible, showing a table with columns for 'Content Type', 'Visible on New Button', and 'Default Content Type'. Two content types are listed: 'Request Submission' and 'Manage Work Request', both with checkmarks in the 'Visible on New Button' column and 'Request Submission' as the 'Default Content Type'.

Content Type	Visible on New Button	Default Content Type
Request Submission	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Manage Work Request	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Below the table, there are options to 'Add from existing site content types' and 'Change new button order and default content type'.

The 'Columns' section is also visible, showing a table of columns with their types and where they are used in the list.

Column (click to edit)	Type	Used in
Area	Single line of text	Request Submission, Manage Work Request
Assignment Comments	Multiple lines of text	Manage Work Request
Quality Assurance	Choice	Manage Work Request
Request	Multiple lines of text	Request Submission, Manage Work Request
Request Status	Single line of text	Manage Work Request
Request Title	Single line of text	Request Submission, Manage Work Request
Work Assigned To	Person or Group	Manage Work Request
Created By	Person or Group	
Modified By	Person or Group	

## Step 6: Add New Content Types and Set Default

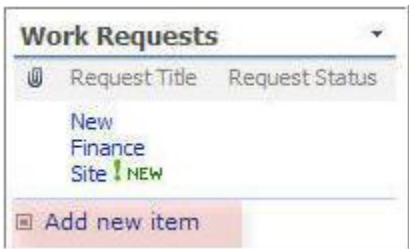
In the Content Types section, add in the two Content Types you created for submissions and item management. Then set the submission one as the default. When a user clicks on New, either in the full or summary toolbar on the list view web part, they will be defaulted to the submission form. Optionally, you can delete the Item Content Type as a housecleaning item to prevent any confusion. Note, you will need to have both Content Types Visible on New Button in order to edit the Content Type from submission to manage work item on the form. The user submitting the request will not see the Content Type selection.

## Step 7: Modify Title

Now you can change the column Title to whatever you wish within the list column but not on the Content Type.

### Step 8: Add List View to the Page or Hyperlink to New Submission Form

Wherever you want the users to submit their requests, you can either create a hyperlink to the new form or use a List View Web Part on a page with the Summary toolbar. You can also include the Status in this view for the user to be able to keep track of the request status.



### Ready, Set, Action!

Now when a user submits a request, you can edit the item, select the management Content Type to display all the fields you need to manage their submission.

