

MOC 55219 A: Nintex Workflow and Forms for Office 365

Course Summary

Description

This two day instructor-led course will show you how to use the Nintex Workflow app and the Nintex Forms app in Office 365.

Nintex Workflow for Office 365 extends Office 365 and allows you as a site owner to automate business processes. Creating workflows might have previously been a job for a developer but Nintex Workflow aims to bring workflow design within reach of all SharePoint site owners. This class looks in detail at all of the options available in the Nintex Workflow for Office 365 app including the design interface, types of workflow that can be created and a wide variety of workflow commands known as actions to automate business processes from approvals to language translation.

Nintex Forms for Office 365 does the same job for form design allowing users to create and edit forms without the need for programming. We will review the design interface and create forms in a variety of business scenarios.

Objectives

After taking this course, students will be able to:

- Understand when to use Nintex Workflow and Forms in SharePoint Online
- Automate common business process including approval and feedback
- Know when and how to create site and list workflows
- Use a variety of workflow actions to standardize business processes including document management, for example deleting or copying documents to another location
- Create custom data entry forms for use in SharePoint

Topics

- Introduction to Nintex Workflow for Office 365
- Getting Started with Nintex Workflow for Office 365
- Types of Workflow
- Workflow Actions
- Create and Manage Nintex Forms

Audience

This course is designed for anyone who needs to understand and use Nintex Workflow and Nintex Forms with SharePoint online to customize and automate business processes.

Prerequisites

Before attending this course, experience with SharePoint Online is beneficial but not required.

Duration

Two days

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Course Outline

I. Introduction to Nintex Workflow for Office 365

In this module you will learn what Nintex Workflow is and when to use it. Here you will also find a brief overview of how Nintex Workflow for Office 365 compares to Nintex Workflow 2010/2013 on premises. You will learn how to add Nintex Workflow for Office 365 to your Office 365 environment so that you are ready to start building workflows in module two.

- A. Course Overview
 1. Introduction to Nintex Workflow for Office 365
 2. Getting Started
 3. Types of Workflow
 4. Workflow Actions
 5. Introduction to Nintex Forms for Office 365
- B. Module Overview and Objectives
- C. What Do People Use Nintex Workflow?
- D. Feature Overview
 1. In browser editing – no code required
 2. Drag and Drop – User Friendly
 3. Lazy Approval
 4. Online Services – Facebook
 5. Loops
 6. State Machines
 7. 2013 Workflow Engine
- E. Sharepoint and Nintex Workflow for Office 365
- F. Add the Nintex Workflow for Office 365 App
 1. Add the Nintex Workflow app to your site for the first time
 2. Update an App
- G. Office 365 the Good and the Bad
- H. Is Nintex Workflow for Office 365 the Same as Nintex Workflow 2010\2013 on Premises?

Lab: Prepare SharePoint ready for Workflow

- Login to Office 365
- Add the Nintex Workflow for Office 365 App

II. Getting Started with Nintex Workflow for Office 365

Your next step is to learn the fundamentals of how to create workflows. You will be introduced to the Nintex workflow design interface and get the chance to build your first workflow. The workflows will be small at first but the techniques and good habits you learn here will help you to build large and more complex workflows later in the class.

- A. Introducing the Nintex Workflow Designer
 1. What is the Nintex Workflow Designer?
 2. Launching the Nintex Workflow Designer
 3. Workflow Design Interface
- B. Create a New Workflow
 1. Creating a Workflow
 2. Adding Multiple Actions
- C. Starting the Workflow
 1. Starting a workflow manually
 2. Starting a workflow automatically
- D. Managing the Workflows
 1. Working with Workflow tasks
 2. Removing a Workflow

Lab: Getting Started

- Approval Workflow for New Documents
- Test the New Workflow
- Update the Workflow

III. Types of Workflow

Now that you understand the workflow design interface you are ready to see the different types of workflow that are available to create, you will learn about list, library and site workflows. You will learn when each type or workflow should be used and how to create and maintain them. You will also get to build a few more complex workflows including site workflows to test these techniques.

- A. List and Library Workflows
 1. List and Library Workflow Settings
- B. Site Workflow
 1. Starting Site Workflows
 2. Site Workflow Settings
 3. Where do I create a site workflow?
 4. Create a New Site Workflow
 5. Start a Site Workflow

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Course Outline (cont'd)

6. Connect a Site Workflow to a Hyperlink
7. Start a workflow from within another workflow

Lab: Types of Workflow

- Export and Import a List Workflow
- Create a Site Workflow to Clean Up Your Site
- Test Your Clean Up Workflow

IV. Workflow Actions

Having seen the different types of workflow available the final per of mastering workflow design is to review in more detail the workflow actions. Actions are the building blocks which are used to create the functionality of a workflow. Here you will get to push to limits of Nintex Workflow and see how far you can take the product. The workflows will grow bigger and more complex again as we work through this the biggest module of the course learning about workflow actions. There are too many actions to discuss all of them during the class but we will cover each type of action such as Logic and Flow for controlling the structure of your workflow, User Interaction for sending users information and capturing their responses and Libraries and Lists where we can automate the process of manipulating, copy and deleting documents.

- A. Workflow Variables
 1. Types of Variable
 2. Edit and Delete Variables
 3. To delete a workflow variable
 4. To edit an existing workflow variable
- B. "Office 365" Actions vs None Office 365 Actions
- C. Libraries and Lists Actions
- D. User Interaction Actions
 1. Email and Lazy Approval
- E. Operations Actions
- F. Utility Actions
- G. Logic and Flow Actions
 1. Prepare for the App Step action

- H. Integration Actions
- I. Provisioning Actions
- J. Social Actions
- K. Combinations of Actions

Lab: Workflow Actions

- Bring the News From Twitter to Your Site
- Translate a Document from English to French and German

V. Create and Manage Nintex Forms

By this point in the class you have now mastered workflow design, the next challenge is to improve your workflows further by editing the forms which are used to interact with the workflow. These forms are an important part of any business process. You will learn how to use the Nintex Forms design interface to not only brand the forms to give them a professional look and feel you will also learn how to add business logic into your forms to help users enter the correct data first time, improving the accuracy of your business processes. To finish the class we will show you that Nintex Forms can also be used in lists and libraries where Nintex Workflow is not in use.

- A. Introducing Nintex Forms for Office 365
- B. Feature Overview Nintex Forms
 1. In Browser Editing and in Browser Fill in- Fast and Simple to Use
 2. Conditional Formatting
 3. Repeating Sections
 4. One Form for Many Devices
 5. Use Custom Forms while Offline – thanks to Nintex Mobile
- C. Types of Form
 1. List Forms
 2. Library Forms
- D. Add the Forms App to a Site
 1. Add the Nintex Workflow app to your site for the first time