

## **MOC 55221 A: Nintex 2013 Administrator**

### **Course Summary**

#### **Description**

This course focuses on how to install and configure all the components of the Nintex Workflow and Forms offerings.

#### **Objectives**

After taking this course, students will be able to fully install and configure Nintex in your SharePoint environment.

#### **Topics**

- Overview
- Introduction to Nintex
- Installing and Configuring Nintex Workflow
- Installing and Configuring Nintex Forms
- Installing and Configuring Nintex Live
- Testing Your Configuration
- Workflow Reporting
- Backup, Restore and Upgrades
- Nintex for Project Server

#### **Audience**

This course is designed for anyone that is tasked with installing and managing a SharePoint Farm with Nintex installed or needing to be installed.

#### **Prerequisites**

Before attending this course, an understanding of SharePoint Administration is helpful, but not required.

#### **Duration**

Three days

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### Course Outline

#### I. Overview

- A. A simple introduction module.

#### II. Introduction to Nintex

In this module, you will learn about the various Nintex products and how they work together to provide a cohesive software solution that complements SharePoint Server. You will also review the Nintex Licensing models.

- A. Nintex Introduction
- B. Nintex Licensing

#### III. Installing and Configuring Nintex Workflow

In this module, you will learn how to install and configure Nintex Workflow; this included creating databases, enabling workflow actions on web applications, configuring LazyApproval, message templates, workflow constants and holidays.

- A. Hardware and Software Requirements
- B. Installing Nintex Workflow
- C. Configuring Nintex Workflow
- D. Enabling Workflow Actions
- E. Lazy Approval
- F. Misc Configuration Topics

##### Lab: Installing Nintex Workflow

- Install Nintex Workflow on on-premises SharePoint Farm
- Install the Nintex Exchange Connector Service

##### Lab: Configuring Nintex Workflow

- Configure Nintex Workflow
- Installing a License
- Managing Nintex Databases
- Enabling Workflow Actions
- Configuring Global Settings
- Manage LazyApproval Settings
- Message templates
- Workflow Constants
- Adding holidays
- Exploring Miscellaneous farm configuration settings

##### Lab: Configuring Nintex Workflow for Sites

- Configure Nintex Workflow for Site Collection

##### Lab: Working with NWADMIN

- Explore features of NWADMIN.exe

##### Lab: Installing Custom Components (Optional)

- Adding user defined actions

#### IV. Installing and Configuring Nintex Forms

In this module, you will learn how to install and configure Nintex Forms and what form controls and device templates are and how to configure them.

- A. Installing Nintex Forms
- B. Configuring Nintex Forms
- C. Form Controls
- D. Device Layouts

##### Lab: Installing Nintex Forms

- Install Nintex Forms

##### Lab: Configuring Nintex Forms

- Manage Licensing
- Manage the Forms Databases
- Explore out of box forms controls
- Explore device layouts

##### Lab: Custom Nintex Form components

- Install Custom Form Control
- Import Custom Forms Controls
- Add new Device Layout
- Import new Device Template

##### Lab: Configure Nintex Forms for Sites

- Configure Nintex Forms on a Web Application
- Configure Nintex Forms on a Site Collection

#### V. Installing and Configuring Nintex Live

In this module, you will learn about Nintex Live and how to install and configure it into your environment.

- A. Introduction to Nintex Live
- B. Installing Nintex Live
- C. Configuring Nintex Live

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### Course Outline (cont'd)

#### **Lab: Installing and Configuring Nintex Live**

- Install Nintex Live
- Configure and Enable Nintex Live for Workflows
- Configure and Enable Nintex Live for Forms

#### **VI. Testing Your Configuration**

In this module, you will learn how to create workflows, forms and use Nintex Live.

- A. Creating and Using Workflows
- B. Creating and Using Forms
- C. Nintex Mobile

#### **Lab: Creating a Nintex Workflow**

- Create a Nintex Site Workflow
- Create a Nintex List Workflow
- Explore Nintex Actions

#### **Lab: Creating a Nintex Form**

- Create Nintex List Form
- Create Nintex Workflow Form
- Use out of box Form Controls
- Use custom Form Controls
- Explore Device Templates

#### **Lab: Using Nintex Live**

- Using Nintex Live to download new Actions

#### **VII. Workflow Reporting**

In this module, you will learn about the out of box reports provided by Nintex and how to create your own reports.

- A. Administrative Reporting
- B. Workflow Reporting

#### **Lab: Working with Nintex Reports**

- Explore Administration Reports
- Add a new custom Report

#### **Lab: Creating custom reports**

- Create a more advanced Workflow Report

#### **VIII. Backup, Restore and Upgrades**

In this module, you will learn how to backup, restore and upgrade Nintex Components.

- A. Backup
- B. Restore
- C. Upgrading

#### **Lab: Backup Nintex**

- Backup Nintex Workflow and Forms databases
- Backup SharePoint Content Databases

#### **Lab: Restore Nintex**

- Restore Nintex Workflow & Forms

#### **Lab: Upgrade Nintex**

- Upgrade a Nintex Instance

#### **IX. Nintex for Project Server**

In this module, you will learn to install and configure Nintex for Project Server.

- A. Nintex For Project Server Intro

#### **Lab: Installing and Configuring Nintex For Project Server**

- Install Nintex for Project Server
- Configure Nintex for Project Server
- Test Nintex for Project Server

#### **Lab: Creating Nintex Project Server Workflows**

- Create a Nintex Project Server Workflow