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55219: Nintex Workflow and Forms for Office 365

Duration: 02 days

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.

AUDIENCE

Anyone who needs to understand and use Nintex Workflow and Nintex Forms with SharePoint online to customize and automate business processes.

AT COURSE COMPLETION

After completing 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

COURSE OUTLINE

Module 1: Introduction to Nintex Workflow for Office 365

Lessons

- 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
 - MODULE OVERVIEW AND OBJECTIVES
 - WHAT DO PEOPLE USE NINTEX WORKFLOW?
 - FEATURE OVERVIEW
 - In browser editing – no code required
 - Drag and Drop – User Friendly
 - Lazy Approval
 - Online Services – Facebook
 - Loops
 - State Machines
 - 2013 Workflow Engine
- SHAREPOINT AND NINTEX WORKFLOW FOR OFFICE 365
- ADD THE NINTEX WORKFLOW FOR OFFICE 365 APP
 - Add the Nintex Workflow app to your site for the first time

- Update an App
- OFFICE 365 THE GOOD AND THE BAD
- 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

After completing this module, students will be able to:

- Describe the benefits of Nintex Workflow and Forms for Office 365
- Login to Office 365 and configure a SharePoint site ready to create workflows

Module 2: Getting Started with Nintex Workflow for Office 365

Lessons

- INTRODUCING THE NINTEX WORKFLOW DESIGNER
 - What is the Nintex Workflow Designer?
 - Launching the Nintex Workflow Designer
 - Workflow Design Interface
- CREATE A NEW WORKFLOW
 - Creating a Workflow
 - Adding Multiple Actions
- STARTING THE WORKFLOW
 - Starting a workflow manually
 - Starting a workflow automatically
- MANAGING THE WORKFLOWS
 - Working with Workflow tasks
 - Removing a Workflow

Lab : Getting Started

- APPROVAL WORKFLOW FOR NEW DOCUMENTS
- TEST THE NEW WORKFLOW
- UPDATE THE WORKFLOW

After completing this module, students will be able to:

- Create workflows to automate common business processes

- Update existing workflows
- Delete workflows that are no longer needed

Module 3: Types of Workflow

Lessons

- LIST AND LIBRARY WORKFLOWS
 - List and Library Workflow Settings
- SITE WORKFLOW
 - Starting Site Workflows
 - Site Workflow Settings
 - Where do I create a site workflow?
 - Create a New Site Workflow
 - Start a Site Workflow
 - Connect a Site Workflow to a Hyperlink
 - 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

After completing this module, students will be able to:

- Understand when to use each type of workflow
- Create and manage site workflows
- Run site workflows from a hyperlink
- Connect multiple workflows together to build more complex workflows

Module 4: Workflow Actions

Lessons

- WORKFLOW VARIABLES
 - Types of Variable
 - Edit and Delete Variables
 - To delete a workflow variable
 - To edit an existing workflow variable
- “OFFICE 365” ACTIONS VS NON-OFFICE 365 ACTIONS

- LIBRARIES AND LISTS ACTIONS
- USER INTERACTION ACTIONS
 - Email and Lazy Approval
- OPERATIONS ACTIONS
- UTILITY ACTIONS
- LOGIC AND FLOW ACTIONS
 - Prepare for the App Step action
- INTEGRATION ACTIONS
- PROVISIONING ACTIONS
- SOCIAL ACTIONS
- COMBINATIONS OF ACTIONS

Lab : Workflow Actions

- BRING THE NEWS FROM TWITTER TO YOUR SITE
- TRANSLATE A DOCUMENT FROM ENGLISH TO FRENCH AND GERMAN

After completing this module, students will be able to:

- Use workflow variables to connect multiple workflow actions together, forming solutions to more complex business scenarios
- Build smart workflows by adding logic to your workflows including decisions and loops
- Speed up approval process response times with Lazy approval
- Connect workflows to other business systems beyond SharePoint Online

Module 5: Create and Manage Nintex Forms

Lessons

- LESSON 1: INTRODUCING NINTEX FORMS FOR OFFICE 365
- FEATURE OVERVIEW NINTEX FORMS
 - In Browser Editing and in Browser Fill in- Fast and Simple to Use
 - Conditional Formatting
 - Repeating Sections
 - One Form for Many Devices
 - Use Custom Forms while Offline – thanks to Nintex Mobile
- LESSON 2: TYPES OF FORM
 - List Forms

- Library Forms
- LESSON 3: ADD THE FORMS APP TO A SITE
 - Add the Nintex Workflow app to your site for the first time

After completing this module, students will be able to:

- Understand the benefits of using Nintex Forms in SharePoint Online
- Know how to enable Nintex Forms for use in a SharePoint Online site