Nintex Workflow, Forms and Mobile 2013

COURSE OVERVIEW

Nintex® Forms for SharePoint®   Nintex® Mobile

Duration: 4 days

This first 3 day of this course covers everything you need to know to install and use Nintex Workflow 2013, whether you are new to the product or already have some experience this course has something for everyone.

This fourth day of this instructor-led course will show you how to use Nintex Forms and Nintex Mobile to customise forms for use in SharePoint 2013 and Nintex Workflow 2013.

The course starts with an overview of the product, giving insight into potential uses, followed by an installation module to familiarise you with how the product works behind the scenes.

The rest of the course is dedicated to learning how to build and manage workflows, starting small with simple approval workflows but soon growing in sophistication as the workflows grow and you learn how to work with a variety of techniques including serial approval, loops, variables, database connections, error handling and state machines.

This course will suit a varied audience from developers to sales people.

Nintex Workflow 2013 exists to allow workflow creation and management without the need for programming, this sets the tone for the course with no programming required during any of the topics.

Note: This release of Nintex Workflow 2013 contains the same functionality as Nintex Workflow 2010, if you have already attended the Nintex Workflow 2010 course you will not benefit from this course.

Nintex Forms 2013 makes it easy to create and complete engaging forms in the browser without the need for code. The fourth day of this course begins with an Introduction to Nintex Forms explaining where forms can be created and the terminology used to describe forms.

Next you will see how simple forms can be created quickly and easily followed by a series of progressively more dynamic forms working with data from lists, libraries and workflows to reveal the full potential of the product.

Once you have mastered the components used to build forms next we turn our attention to the look and feel of the forms learning how to customise the branding of individual forms including backgrounds and logos to ensure that your forms match your corporate branding. We will also show you how to modify the templates that are used to define new forms.

The course concludes by showing you how to make your forms available to fill in outside of your SharePoint environment with the use of Nintex Live and Nintex Mobile

Prerequisites

This course is a demanding four days aimed at delegates that are already experienced users of SharePoint. No prior knowledge of Nintex Workflow is needed but some previous experience of Nintex Workflow would be an advantage. It would also be an advantage if you have experience of creating workflows in Microsoft SharePoint Designer or Visual Studio.

The content of the Workflow section of this course covers the following topics:

- *Installation and configuration of Nintex Workflow - upgrade issues etc.*
- *Workflow fundamentals and Introducing Nintex Workflow designer, Rich Workflow designs*
- *using Nintex Workflow designer, Advanced Workflow Design capabilities with Nintex*
- *Workflow, Creating State Machine workflows with Nintex Workflow.*
- *The Modules include the following topics.*

Introduction to Nintex Workflow

- *Overview of Nintex Workflow*
- *Workflow logic – defining workflow*
- *Nintex Workflow and SharePoint*
- *Nintex Web Site and Support*

Installation and Configuration

- *Product versions and features*
- *Installation requirements and setup*
- *Central Administration Configuration*
- *Upgrading*

Getting Started with Nintex Workflow

- *Activating Nintex Workflow Site Features*
- *Introducing the Nintex Workflow designer*
- *Create a workflow*
- *Managing the Workflows*
- *Working with Templates*
- *Managing Site level Settings*

Creating Rich Workflows

- *Conditions and Action Sets*
- *Working with Snippets*
- *Using Workflow Variables*
- *Rich Workflow Actions*

Advanced Workflows

- *Working with Publishing Actions*
- *Provisioning Active Directory Object*
- *Managing Audiences and Profiles*
- *Enterprise Integration*
- *Enterprise Reporting*

State Machine Workflows
- *The State Machine Action*
- *Building a simple State Machine workflow*

User Interface
- *Click less and do more*
- *The Ribbon*
- *Zoom and Print*
- *Association Columns*
- *Workflow Approval*

User Defined Actions
- *User Defined actions overview*
- *Creating User Defined actions without programming*

Reusable Workflows
- *Creating Reusable workflows*
- *Site workflows*

Further Workflow Actions
- *Store data and Retrieve data actions*
- *Capture document set version*
- *Delete previous versions*
- *Delete drafts*
- *Delete multiple items*
- *Convert document*
- *Create item in another site*
- *Update CRM record*
- *Delete/Disable CRM record*
- *Query CRM*
- *Read document*
- *Send document set to repository*
- *Submit record*
- *Declare as record*
- *Undeclare as record*
- *Update document*
- *Wait for check out status change*
- *Get meeting suggestions*

WORLD EDUCATION ALLIANCE

Day four – Forms and Mobile

Module 1: Introduction to Nintex Forms

This module provides an introduction to Nintex Forms showing how it integrates with SharePoint and Nintex Workflow and Nintex Live. We also review some of the key features which make Nintex Forms unique.

Lessons

- Introduction to Nintex Forms 2013
- Feature Overview
- Types of Form
- Form Controls

Module 2: Getting Started with Nintex Forms

This module moves from the theory of form design to actually creating basic forms using a variety of controls such as drop down menus and check boxes.

Lessons

- Using the form design interface
- Building basic forms
    - Grids, Guides and Snap
    - Form Size
    - Undo, Version History and Preview
    - Save, Publish and Delete
    - Form Redirect
- Demonstrations of Forms in:
    - Lists
    - Libraries
    - Workflows

Module 3: Building Rich Forms

Having mastered creating basic forms in module two we now look at the more advanced options available with Nintex Forms including.

Lessons

- Nintex Workflow Start Forms
- Repeating sections and List Lookups
- Using Rules to hide or disable part of a form with panels

Module 4: Form Styles

Now that your forms work the way that you want them to we next spend some time to get them looking great. You will learn how to edit the component of an individual form to ensure that they conform to your companies' style guide or branding. At first we focus on editing individual forms and later we will look at how to edit the default styles that are applied when a new form is created – this is a great way to ensure that all new forms are consistent and align with your corporate branding.

Lessons

- Edit individual forms
    - Logo
    - Background
    - Borders
    - Control Settings including borders, colours and fonts
    - Rules to apply Conditional Formatting
- Advanced Form Styles
    - Update the Form Template
    - Cascade Style Sheet

Module 5: Mobile Forms

Your forms are now easy to use and looking great on a desktop computer but nowadays many people use mobile devices to read and capture data while traveling. This module will show you how to customise forms for use on specific mobile devices and how to publish forms so they can be completed from outside of your SharePoint environment either via the internet or offline. As always this will be done without the need for code or technical support, all of this is within reach of a typical end user.

Lessons

- Introduction to Nintex Live and Nintex Mobile
- Form Layouts for mobile devices
- Mobile specific form controls
    - Add Photos
    - Add Video
    - Add Location
- Complete forms while offline

On Completion

After completing this course, students will be able to:

- Create Forms for use in SharePoint lists and libraries
- Create Forms for use in Nintex Workflow
- Use the rich features of Nintex Forms such as repeating sections and calculations

- *Customise the branding of forms – including logos and colour scheme*

Publish forms to Nintex Live and Mobile so they can be completed by users online and offline