



Synergy Technology Information Worker Training Series

Nintex Forms Design

Course Outline

The purpose of this day long course is to educate course attendees on the key uses for Nintex Forms in SharePoint. In addition to learning about the capabilities and benefits of Nintex Forms, students will learn how to install, configure and deploy Nintex Forms in Central Administration, including Nintex Live settings and features. Students will then develop key skills on authoring forms functionality, logic, and have techniques for branding and deploying forms in the enterprise. Students will learn how to use the browser design interface to create forms for SharePoint lists, Start and Task Forms for Nintex Workflow processes, and how to design forms for mobile platforms including smart phones and tablet devices.

Skills Gained

After completing the course students will:

- Understand the different form options including out-of-the-box forms, InfoPath Forms, and Nintex Forms in SharePoint and when to use each
- Understand the components and capabilities of Nintex Forms
- Understand the Nintex Forms design tool
- Know how to customize and publish custom SharePoint List Forms
- Understand and be able to design Nintex Workflow Start and Task Forms
- The capability to design, customize and publish mobile accessible forms
- Have techniques and skills to perform validation, lookups, and advanced functions

Target Audience

This class is designed for Site Administrators who have experience with administering SharePoint sites, and have a solid understanding of the SharePoint site framework including Lists/Libraries, permissions, and have some understanding of enterprise features like Business Connectivity Services, InfoPath Forms Services, and Nintex Workflows.



Prerequisites

Students attending this class should have a working knowledge of SharePoint and its structures and capabilities. A solid understanding of Nintex Workflow Workgroup, Standard, or Enterprise editions with some experience designing and building workflows is important for Forms Design with workflows. Students who do not meet these criteria should attend Synergy's SharePoint Site Administration or SharePoint Power User course, and/or have attended Synergy's Nintex Workflow course.

1. Understanding Form Tools

This chapter focuses on the different platforms for forms delivery, including SharePoint List forms, InfoPath Forms and InfoPath Forms Services, Nintex Forms, and discusses a features matrix which will help students identify the right tool for your businesses form requirements.

Key Concepts: Form options in SharePoint, feature comparison matrix, selecting the right tool

2. Installing, Configuring, and Deploying Nintex Forms

In this chapter, students will learn how to install and configure Nintex Forms in Central Administration following best practices, and after installation and configuration are completed how to deploy the solution to the Web Application and Site Collections where you intend to use Nintex Forms. Nintex Live deployment is discussed in this chapter introducing students to the cloud services offered by Nintex.

Key Concepts: Installation, Configuration, Deployment, and cloud services

3. Form Design Basics and Best Practices

In this chapter, we explore the basics of designing forms, including best practices developed during numerous projects in the enterprise. Students will learn about branding, look and feel, and considerations for the consumer of your form-the end user. In addition, students will learn about the critical step of gathering requirements and documenting those requirements. Finally, students are introduced to the Forms Designer interface including the canvas, Ribbon, and control, rule, and controls in use panels.

Key Concepts: Form design basics, form design best practices, form branding, designing for user experience, requirements gathering and documentation, design tool menu and settings



4. **Understanding Nintex Forms Controls**

In this chapter, students will gain familiarity with the Controls provided by Nintex Forms, with an understanding of some of the requirements for the configuration of each. This controls chapter will discuss the groupings for the controls in the Nintex Forms design tool, and will discuss some of the advanced capabilities each control supports for more advanced form scenarios.

Key Concepts: Nintex Forms Controls, configuration settings, and advanced control settings

5. **Branding, Design and Appearance**

What differentiates a widely adopted and successful form from a poorly adopted one? In this chapter, we explore designing and branding forms. Students will learn about branding, look and feel, and considerations for the consumer of your form-the end user. Students will also be introduced to advanced design aspects including using CSS for controlling appearance. Finally, we will discuss working with Nintex Forms Web Parts.

Key Concepts: form design controls, designing for user experience, advanced design and appearance through CSS.

6. **Advanced Nintex Form Operations**

In this chapter students will learn about configuring and deploying CSS, JavaScript, and rules for validation and advanced form operations using runtime and inline functions and the formula builder. Designing and deploying mobile Forms, Workflow Start and Task Forms, and Forms for external lists are discussed. This chapter will also discuss the web parts included with Nintex Forms, and usage scenarios for each.

Key Concepts: mobile forms, deploying CSS, JavaScript, Nintex start and task form publishing, inline functions, rules, runtime functions and formula builder