



Nintex Workflow Design

Synergy Technology Training Series

Course Outline

The purpose of this 1-day course is to present students with strategies and techniques for developing workflows using Nintex Workflow's graphical user interface and the actions provided by the suite.

Skills Gained

After completing the course students will be able to:

- Understand workflows and what makes up a workflow
- Understand the out-of-the-box workflows and the limitations
- Have strategies and techniques for developing custom workflows in SharePoint
- Have an understanding of the design interface of Nintex Workflow
- Understand the unique aspects of Nintex Workflow and how to utilize them in custom workflows
- An understanding of the actions provided by Nintex Workflow and how to customize and configure actions
- Create workflow templates and snippets

Target Audience

The class is geared towards individuals with a solid understanding of the SharePoint architecture, including content types, lists, libraries, and advanced functionality such as BCS for using data outside of SharePoint in workflow design. Some experience with workflows in SharePoint, or customizing workflows in SharePoint Designer is recommended.

Prerequisites

Students attending this class should be advanced SharePoint users who have experience creating, editing and maintaining SharePoint sites, lists, libraries, and content types. Experience with customizing workflows in SharePoint using the browser or SharePoint Designer strongly recommended but not required.



1. Workflows in Microsoft Office SharePoint Server

This chapter introduces students to workflows, defining what a workflow is and what elements make up a custom workflow. This introduction to the workflow design process also demonstrates where in SharePoint workflows can be used, and discusses the out of the box capabilities and limitations of workflows in SharePoint. This chapter also discusses where you can manage workflows using the Workflow Gallery, as well as workflow versions and tasks.

2. Introduction to Nintex Workflow

Students are introduced to the licensing options and resources to identify which Nintex Workflow product is ideally suited to their environment.

3. Configuration and Setup of Nintex Workflow

Students are introduced to the Central Administration console settings for Nintex, where they will learn to configure the Nintex Workflow database, the solution activation process, managing actions, the global settings for the Nintex product suite, and managing LazyApproval settings.

4. Getting Started with the Nintex Workflow Designer

Students are introduced to the Workflow designer interface, where Site Owner or Site Collection administrator can create, export and import workflows, and publish the completed workflows into lists or libraries. This chapter also covers some of the templates available for the workflow designer, and explores some of the concepts unique to Nintex Workflow such as Workflow Snippets, start data, and constants.

5. Nintex Workflow Interaction with SharePoint

This chapter introduces students to Lazy Approval, the process of approving, rejecting and reviewing workflows, and also demonstrates some of the helpful Web parts available through Nintex. This chapter also covers reviewing active and historical workflow data as well.

6. Exploring Workflow Actions

Nintex Workflow provides numerous workflow actions which can be performed by the configured workflow. This chapter gives students a working knowledge of the available workflow actions and explores some of the tasks that can be automated using these actions.

7. Creating a custom workflow using Nintex Workflow

This chapter brings all of the design elements together to demonstrate how to collect the necessary elements to successfully design a workflow in Nintex, create the necessary forms and document libraries, and publish the workflow to a list or library in SharePoint.