COURSE OVERVIEW

NINTEX WORKFLOW AND FORMS FOR OFFICE 365

Duration: Two days

Overview

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 within the need for programming. We will review the design interface and create forms in a variety of business scenarios.

Audience

Anyone can attend this class but a prior knowledge of using SharePoint as a Site Owner would be advantageous.

If you wish to use Nintex Forms and Nintex Workflow in SharePoint on premises (not in Office 365) then this is not the class for you, instead you should attend our three day Nintex Workflow 2013 class and our one day Nintex Forms and Mobile class.

Outline
Module 1: Introduction to Nintex Workflow for Office 365

In this module you will learn what Nintex Workflow is and when to use it. Here you will also find a brief overview of how Nintex Workflow for Office 365 compares to Nintex Workflow 2010/2013 on premises.

You will learn how to add Nintex Workflow for Office 365 to your Office 365 environment so that you are ready to start building workflows in module two.

Module 2: Getting Started

Your next step is to learn the fundamentals of how to create workflows. You will be introduced to the Nintex workflow design interface and get the chance to build your first workflow. The workflows will be small at first but the techniques and good habits you learn here will help you to build large and more complex workflows later in the class.

Module 3: Types of Workflow

Now that you understand the workflow design interface you are ready to see the different types of workflow that are available to create, you will learn about list, library and site workflows. You will learn when each type or workflow should be used and how to create and maintain them. You will also get to build a few more complex workflows including site workflows to test these techniques.

Module 4: Workflow Actions

Having seen the different types of workflow available the final per of mastering workflow design is to review in more detail the workflow actions. Actions are the building blocks which are used to create the functionality of a workflow. Here you will get to push to limits of Nintex Workflow and see how far you can take the product. The workflows will grow bigger and more complex again as we work through this the biggest module of the course learning about workflow actions.

There are too many actions to discuss all of them during the class but we will cover each type of action such as Logic and Flow for controlling the structure of your workflow, User Interaction for sending users information and capturing their responses and Libraries and Lists where we can automate the process of manipulating, copy and deleting documents

Module 5: Create and Manage Nintex Forms

By this point in the class you have now mastered workflow design, the next challenge is to improve your workflows further by editing the forms which are used to interact with the workflow.

These forms are an important part of any business process. You will learn how to use the Nintex Forms design interface to not only brand the forms to give them a professional look and feel you will also learn how to add business logic into your forms to help users enter the correct data first time, improving the accuracy of your business processes.

To finish the class we will show you that Nintex Forms can also be used in lists and libraries where Nintex Workflow is not in use.