

Microsoft - Nintex 2013 End User (Workflow + Forms)

Code:	55222
Length:	5 days
URL:	View Online

This course will give you the knowledge and skills to use Nintex Workflows and Forms in a variety of ways. The Nintex Workflow content will teach you to build simple and advanced workflows using various types of workflows made up of basic and advanced actions. Learn about Nintex Live and Nintex Cloud Services and how you can use them to enhance your workflow capabilities even further!

Skills Gained

- Learn how to build and use workflows with list and library data, and how to integrate nintex forms into lists and workflows. Explore complex topics like repeating sections, looping and validation rules. Learn how to you Nintex Live to expose your Workflows and Forms outside your company network.

Who Can Benefit

Anyone that has to write Nintex Workflows or Form applications to automate business processes. Course has a bit of everything and will benefit developers, power end users and basic end users.

Prerequisites

- Basic understanding of SharePoint terminology (sites, lists, libraries, etc). How to browse web sites. No knowledge of Nintex Workflow is required, but would be helpful. An understanding of SharePoint workflows would also be beneficial. Understand your business processes and what you are trying to automate. Know what your current system limitations are and be ready to discuss if they will still be needed or replaced by Nintex. Know about basic development concepts such as loops, data structures and data access.

Course Details

Outline

Module 1: Overview

- A simple introduction module.

Lessons

- N/A

After completing this module, students will be able to:

- Understand your course, classroom, classmates, facility and instructor.

Module 2: Nintex Introduction

Description: In this module, you will learn about the various Nintex products and how they work together to provide a cohesive software solution that complements SharePoint Server. You will also review the Nintex Licensing models.

Lessons

- Nintex Introduction
- Nintex Licensing

After completing this module, students will be able to:

- Describe the various Nintex Products
- Describe the licensing models for Nintex
- Understand how Nintex integrates with SharePoint

Module 3: Nintex Workflows

Description: In this module, you will learn about everything related to building Nintex Workflows.

Lessons

- Intro to Nintex Workflows
- Variables and Constants
- Nintex Actions & Functions
- Miscellaneous Topics
- Troubleshooting and Debugging

Lab 1: Configuring Nintex Workflow for Sites

- Configure Nintex Workflow for Site Collection

Lab 2: Exploring Nintex Designer

- Exploring Nintex Designer
- Create a Nintex Site Workflow
- Create a Nintex List Workflow
- Explore Nintex Actions

Lab 3: Workflow Variables and Constants

- Creating and using Workflow Constants
- Creating and using Variables
- Using variables and constants in workflows
- Workflow constants permissions

Lab 4: Using Basic Actions

- Using Basic Actions in workflows
- Using the Log in history list
- Using the Request Data
- Using the Calculate Date
- Using the Assign to-do task

- Using the Set workflow status
- Using the Pause for
- Using the Create list
- Using the Send Notification

Lab 5: Using Advanced Actions

- Active Directory Actions
- Calling External Services
- Querying LDAP and User Profiles
- Calling workflows
- Avoiding Workflow Looping

Lab 6: Using in-line Functions

- Date Functions
- String Functions
- Copy and Paste Actions
- Modify Action Text Headers

Lab 7: User Defined Functions

- Creating User Defined Actions
- Exporting and Importing User Defined Actions
- Explore User Defined Action Scopes

Lab 8: Snippets and templates

- Creating and using Nintex workflow Templates
- Utilize the Travel Request template
- Creating custom Templates
- Creating custom Snippets

Lab 9: State Machine workflows

- Creating State Machine Workflows

Lab 10: Lazy Approval

- Configure Lazy Approval

Lab 11: Scheduling Workflows

- Scheduling workflows

Lab 12: External Start

- Configuring and Using Nintex External Start
- Configure external start (Zapier)
- Calling external start from custom applications

Lab 13: Nintex XChange

- Review the Nintex Xchange site

Lab 14: Document Generation

- Use Document Generation to create Documents
- Create new document templates
- Convert generated documents to PDF

Lab 15: Nintex and DocuSign

- Learn to use Digital Signatures in Nintex Workflows
- Create a DocuSign Developer Tenant
- Create a DocuSign document template
- Install and use the Nintex DocuSign Connector
- Send a document signature request using DocuSign Connector

Lab 16: Error Handling and Troubleshooting

- Error Handling
- Debugging and Troubleshooting
- Enabling Verbose Logging
- Nintex Support Console

After completing this module, students will be able to:

- Describe the various features Nintex Workflow provide over out of the box SharePoint workflows
- How to configure a site and site collection for Nintex Workflows
- Build and debug various types of workflows with Nintex Designer
- Describe the different out of the box Actions and In-line functions
- Work with Nintex Document Generation and implement digital signatures
- How to debug and troubleshoot Nintex Workflows
- How to use Lazy Approval and Workflow Scheduling

Module 4: Nintex Forms

Description: In this module, you will learn about Nintex Forms. This includes how to deploy the features to a Site Collection and Web, and then use Nintex Forms in workflows and lists and libraries. You will get to explore advanced features like repeating sections and how to use them with workflows, as well as how to implement various types of Form Validation.

Lessons

- Nintex Forms
- Form Controls
- Form Styling
- Form Control Validation and Rules
- Form Logic
- Miscellaneous Topics
- Device Layouts
- Nintex Mobile

- Best Practices

Lab 1: Configure Nintex Forms for Sites

- Configure Nintex Forms on a Web Application
- Configure Nintex Forms on a Site Collection

Lab 2: Creating Simple Forms

- Learn to use the Nintex Form Designer
- Create a simple Nintex List Form
- Create a simple Nintex Workflow Form
- Use out of box Form Controls

Lab 3: Exploring Form and Control Settings

- Explore and Configure Nintex Form Settings
- Import and Export forms
- Using the Clipboard - Copy, cut and pasting
- Creating and Using Form Variables
- Working with Form Layouts
- Exploring Nintex Form Task Panes

Lab 4: Creating Advanced Forms (Styling)

- Grids and Form Sizes
- Nintex Form Styling (CSS, Logos, backgrounds, conditional formatting)
- Nintex Control Styling
- Css Includes and Previewing
- Explore Form Layouts
- Create Form Device Layouts
- Preview Form Device Layouts
- Versioning and Form Redirection

Lab 5: Creating Advanced Forms (Logic)

- Form and Control Validation (Simple)
- Form and Control Validation (Regular Expression)
- Form Rules
- Variable Functions
- Calculated Values

Lab 6: Creating Advanced Forms (JavaScript)

- Nintex Forms and JavaScript (Simple)
- Nintex Forms and JavaScript (Advanced)
- Nintex Forms with JavaScript Rest Calls

Lab 7: Creating Advanced Forms (Workflows)

- Using Nintex Forms with Workflows
- Using Repeating Sections with Forms and Workflows
- Implementing Master-Child relationships

Lab 8: Convert Forms to PDF

- Convert Nintex Form to PDF

Lab 9: Exploring Nintex Help Resources

- Utilizing Nintex Help
- Nintex Forums
- Nintex Blogs

After completing this module, students will be able to:

- Create and use Nintex Forms in lists and libraries and with workflows and tasks
- Describe what Forms Control are and how to use them
- Describe what Device Templates are and how to modify them
- How to use advanced features such as repeating sections in forms and workflows
- How Nintex forms works with Mobile Devices
- How to implement offline forms with Nintex Live and Nintex Mobile

Module 5: Nintex Live

Description: In this module, you will learn about Nintex Live and how to use it in your workflows.

Lessons

- Introduction to Nintex Live

Lab 1: Using Nintex Live

- Using Nintex Live to download new Actions
- Explore Nintex Live catalog

Lab 2: Publish Nintex Live Forms

- Publish Forms to Nintex Live

After completing this module, students will be able to:

- Describe Nintex Live features
- Install and configure Nintex Live

Module 6: Nintex Cloud Services

Description: In this module, you will learn about the various Nintex Cloud Service offerings.

Lessons

- Nintex Workflow Cloud
- Nintex Hawkeye
- Nintex Drawloop
- Nintex App Studio

Lab 1: Nintex Workflow Cloud

- Review the new Nintex Workflow Cloud Platform
- Create a Nintex Workflow Cloud Workflow
- Test Nintex Cloud Workflows with Swagger
- Create an App using Nintex App Studio
- Test Nintex Cloud Workflow with Nintex App Studio app
- Call an on-premises workflow from Nintex Cloud
- Call a Nintex Cloud workflow from on-premises

Lab 2: Nintex Hawkeye

- Register for Nintex Hawkeye Cloud
- Create a Nintex Hawkeye Cloud Tenant
- Setup Nintex Hawkeye on-premises
- Create and monitor Workflows with Nintex Hawkeye

Lab 3: Nintex Drawloop

- Create a Salesforce Developer tenant
- Learn to install Nintex Drawloop into Salesforce
- Create a new Drawloop flow

Lab 4: Nintex App Studio

- Create an App using Nintex App Studio
- Test Nintex Cloud Workflow with Nintex App Studio app

After completing this module, students will be able to:

- Describe the various Nintex Cloud based services
- Be able to setup and use Nintex Cloud based services
- Describe the features of Nintex Cloud based services

Module 7: Nintex for Project Server

Description: In this module, you will learn to install and configure Nintex for Project Server.

Lessons

- Nintex For Project Server Intro

Lab 1: Configuring Nintex For Project Server

- Add a PWA Connection
- Configure a PWA Site for Nintex Project Workflow

Lab 2: Creating Nintex Project Server Workflows

- Create a Nintex Project Server Workflow

After completing this module, students will be able to:

- Describe the features of Nintex for Project Server
- Install and configure Nintex for Project Server

- Create workflows for Project Server projects

Schedule (as of 3)

Date	Location
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