

Nintex Workflow 2010

Myriad Technologies Training
1 Day—Level 300



Course Outline

This one day course has been designed to provide SharePoint power users with an introduction to Nintex Workflow 2010. This course has been designed to provide a balance of theory and class room discussion and hands on lab time. This combination of theory and practice enables the students to discuss new concepts and then put them into practical applications during the labs.

Skills Gained

After completing this course the attendees will :

- Understand how to Navigate and search SharePoint Sites
- Understand the benefits of Lists and Libraries in SharePoint
- Have gained practical experience with document management
- Monitor and Participate in a SharePoint Workflow
- Know how to find and connect to information in SharePoint
- Understand how to share information with their colleagues
- Manage and customise content in their Team Site

Target Audience

This course has been designed for anyone who is new to SharePoint 2010 and needs to get up to speed on how they can use SharePoint to collaborate and share information with their colleagues.

Prerequisites

This course has been developed to build upon the advanced topics presented in Site Owners and InfoPath. Course participants should be comfortable discussing topics such as Content Types, MetaData and InfoPath forms.

Course Overview

Introduction to Workflow

The first module establishes the basic concepts which surround business processes and workflows. This module will also discuss the business benefits of workflow with real world examples that can be found in most business environments. This module concludes with a lab that walks you through the questions and decisions that need to be made as you articulate your business processes and translate them into workflows.

Participating in a Workflow

An important aspect of creating an effective workflow is to understand how to initiate and participate in a workflow. During this lesson you will step through the life cycle of initiating and monitoring a workflow. As part of the effective management of a workflow you will be able to terminate workflows which are no longer required as well as inspecting the workflow history which is associated with a document being workflowed.

Creating a Workflow

After you have gained a detailed understanding of how to initiate and manage your workflows you can start creating your own workflows to automate your business processes. This module will introduce you to the Nintex Workflow Designer and the various menus used to create and publish your workflow. During the lab we will automate the approval of an Expense Claim form that has been created in InfoPath.

Managing Your Workflow

Once you have created your workflow you can use Nintex Workflow to manage your published workflows. This module will demonstrate how you can use variables within your workflows and test your workflows after you have completed the publishing process.

Creating Business Logic

Nintex Workflow provides a number of methods and actions for creating your business logic within your workflow. Understanding the various techniques that Nintex Workflow provides enables you to create sophisticated workflows that support your business processes. During the lab you will have the opportunity to explore how easy it is to add logic and decisions into your workflow.

Working with People

A critical part of creating effective workflows which support your daily business processes is understanding how your workflow can interact with people. Understanding the challenges associated with workflows which depend on people will help you create workflows which can utilise tasks, reminders and escalation. These techniques enable your workflows to continue to orchestrate your business process regardless of the availability of the people who are participating in the workflow.

Workflow Templates

Nintex Workflow 2010 includes a number of workflow templates that can be used to create your own workflows from. These templates provide a number of simple examples that can be reused. Nintex

Workflow 2010 also provides the ability for you to create and publish your own templates. During the lab you will explore the ability to create and manage your own templates.

Reporting and Monitoring

An important benefit of automating your business processes through the use of workflow is that you can report on the status of your workflows and monitor your business processes. This level of visibility will enable you to not only understand your business process but you can also identify the bottlenecks within your business process so you can fine tune your workflows to help achieve business process optimisation.