[TN301]: Nintex Masterclass Design and Development

Length   : 4 Days
Delivery Method   : Instructor-led (Classroom)

Course Overview

The purpose of this 4-day course is to present students with strategies and techniques for developing workflows using Nintex's graphical user interface to design and develop professional forms and workflows. The course covers both Nintex on-premises on SharePoint 2013, 2016, or 2019 and Nintex Online on Office 365.

Audience Profile

The class is geared towards individuals who are interested to create custom automated forms workflows with Nintex and is suitable for both business users and technical staff.

At Course Completion

- Understand the components and capabilities of Nintex Forms
- Understand the Nintex Forms design tool
- Know how to customize and publish custom SharePoint List Forms
- The capability to design, customize and publish mobile accessible forms
- Learn techniques and skills to perform validation, lookups, and advanced functions
- Understand Nintex Forms Settings and Administration
- Learn strategies and techniques for developing custom workflows
- Gain an understanding of the design interface of Nintex Workflow
- Learn to use and configure Actions provided by Nintex Workflow
- Create workflow templates and snippets
- Learn advanced Nintex workflow functions and operations
- Understand external data integration with Nintex Workflow
- Learn techniques to test and troubleshoot Nintex Workflows

Pre-Requisites

Students attending this class should have a working knowledge of SharePoint 2016 sites, lists, libraries, and site administration. No previous experience with Nintex is necessary.

Course Outline

Module 1: Getting Started with Nintex Forms
- Introduction to Nintex Forms

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- Getting started with Nintex Forms Designer
- Nintex Form Designer Ribbon
- Preview, Save and Publish with Nintex Forms
- LAB

Module 2: Introduction to Form Controls and Design Basics
- Form Design Basics
- Form Design Best Practices
- Adjust form style in Responsive and Classic form designer
- Adding Controls to the Design Canvas
- Selecting individual or group of controls
- LAB

Module 3: Form Design Controls
- Controls for Form Design / Look-and-Feel
  - Image Control
  - Label Control
  - Border Control
  - Panel Control
  - Rich Text Control
  - Page Break Guide Control

- LAB

Module 4: Data Entry Controls
- Configuring Data Entry controls
  - Single line Textbox Control
  - Date/Time Control
  - Button Control
  - Image Control
  - People Control
  - Yes/No Control
  - Choice Control
  - Multi Line Textbox Control
- Linked Controls
  - Identifying linked controls
  - Unlinking Controls
- LAB

Module 5: Data Validation and Business Rules
- Inserting Reference Fields
- Input Validation
- Using Form Variables
- Connecting Controls to Fields or Variables
- Formatting Rules
- LAB

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Module 6: Managing Published Forms

- Import and Export Forms
- Print to PDF
- Version History
- Configuring List Form Web Part
- Configuring Start Site Workflow Web Part
- Nintex Forms Security
- LAB

Module 7: Extending Forms

- General Controls
  - Calculated Value
  - Geolocation
  - Hyperlink
  - Page Viewer
  - Repeating Section
- SharePoint Controls
  - External Data Column
  - List Item
  - List Lookup
  - List View
  - Attachments
  - Managed Metadata
  - Workflow Diagram
  - List Attachment
  - Recurrence
  - Web Request
  - SQL Request
- LAB

Module 8: Functions and Formulas

- Formula Builder
- Runtime Functions
- Inline Functions
- Function References
- LAB

Module 9: Validating Data and Form Appearance

- Control Visibility and Editability
- Conditional Validations
- Custom Validation using JavaScript
- Cascading Stylesheet (CSS)
- LAB

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Module 10: Task Forms in Workflow
- Designing Workflow Task Forms
- Editing Nintex Workflow Task Forms
  - Assign Flexi task
  - Request approval
  - Request review
  - Request data
- LAB

Module 11: Nintex Forms on Devices
- Publish Forms for Multiple Device Layouts
- Nintex Mobile
- Publish Forms for Nintex Mobile Apps
  - Optimizing User Experience
  - Nintex Form Design Ad
- Publish a Nintex Form Anonymously to the Cloud
- Publish Forms to Nintex Workflow Cloud
- LAB

Module 12: Creating and Managing a Nintex Workflow

- Introduction to Nintex Workflow
- Opening and Saving Workflows
- Importing and Exporting Workflows
- Managing Workflows
- Nintex Workflow Web Parts
- LAB

Module 13: Nintex Task Assignment Workflows

- User Interaction Workflow Actions
  - Assign Flexi task
  - Assign to-do task
  - Task Reminder
- Workflow action settings
  - Task Notification
  - Not Required Notification
  - Reminders
  - Escalation
- Inserting Reference Fields
- Using Lookups
- Workflow Variables
- LAB

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Module 14: Nintex Workflow Approval Process and Settings

- Managing Notification Preferences
- Setting Personal Delegation Preferences
- About LazyApproval
- Approving and Rejecting Tasks
- Delegating Approval Tasks
- Viewing Workflow Status and History
- LAB

Module 15: Working with Lists and Libraries

- Libraries and Lists Actions
- Operations Workflow Actions
  - Log in the history List
  - Start Workflow
  - End Workflow
  - Terminate Workflow
- LAB

Module 16: Conditions and Loops in Nintex Workflow

- Action Set
- Run Parallel Actions
- Set a Condition
- Loop
- Run if
- For Each
- LAB

Module 17: Inline Functions and Operations in Nintex Workflow

- Inline Functions
- Operation Workflow Actions
  - Math operations
  - Calculate Date
  - Convert Value
  - Set a Variable
  - Pause For
  - Pause Until
- LAB

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Module 18: Nintex State Machine Workflows

- State Machine Workflows
- Change State Actions and Logic
- LAB

Module 19: Integrating with External Data

- Workflow Constants
- User Defined Actions Settings and Parameters
- LDAP Picker
- Integration Workflow Actions
- LAB

Module 20. Creating and Managing Site Workflows and Reusable Workflows

- Create and Manage Site Workflow
- Create and Manage Reusable Workflow Template
- Create and Manage Site Collection Reusable Workflow Template
- LAB

Module 21: Testing and Troubleshooting Nintex Workflows

- Workflows Security Considerations
- Expected Workflow and Action Duration
- Manage Workflow History List
- Verbose Logging
- Error Handling
- LAB

Module 22: Configuring and Administering Nintex Setup

- Licensing and Setup
- Forms Environment Settings
- Workflow Environment Settings
- Inventory and Reporting
- Activating Nintex Workflow

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