

2 • Introduction to Nintex Workflow



What is Nintex Workflow?

Nintex Workflow is a product created by Nintex, their started in Australia and are now based in the USA. They have also locations in England, Australia and Malaysia. Nintex is the world's leading SharePoint workflow company, they are even the number one add on for SharePoint with over 5000 customers in 90 countries reaching 7 million users. These customers are serviced by a global network of high quality partners and service providers.



Nintex customers are government, public, and private organizations including over 200 of the Fortune 500, and over 100 major banks. From simple workflows, to complex processes that interconnect multiple systems, Nintex is revolutionizing the way organizations automate business processes.

Nintex has also other SharePoint solutions as Nintex Reporting, Nintex Analytics and the also very popular Nintex Forms. With Nintex Forms you can easily create forms for most common devices.

Nintex Workflow is a software solution created for building workflows in SharePoint and built on Windows Workflow Foundation. OK, that's nice, but first what is a workflow, and what is SharePoint?

What's a Workflow?

If you look at the definition of a workflow from Wikipedia it is described as:

A workflow consists of a sequence of connected steps where each step follows without delay or gap and ends just before the subsequent step may begin. It is a depiction of a sequence of operations, declared as work of a person or group, an organization of staff, or one or more simple or complex mechanisms. Workflow may be seen as any abstraction of real work.

So a workflow is a sequence of steps following each other and that may be seen as real work. You see that Wikipedia doesn't say that these steps are automated, it just refers to them as a sequence of operations. A secretary that collects signatures for an approval process is therefore a valid workflow.

In this book we are going to try to automate these manual workflows into digital workflows so we can make them more manageable and predictable.

When talking about automation there are two types of automation possible: fully automated workflows that run by themselves and where no user interaction is required, and half automated workflows where a user starts or provides input to the workflow. Most of the workflows in this book are going to be half automated where some sort of user interaction is required, but there are sections that can be used to create fully automated workflows.

Workflow management is used when we are talking about the management of workflows within your organisation via a software application. Because Nintex Workflow has workflow management functions integrated in the product we are going to look at these option in feature sections.

What's SharePoint?

SharePoint is a Web application platform developed by Microsoft and has historically been associated with intranet, content management and document management, by a common technical infrastructure. SharePoint can be used to provide intranet portals, document & file management, collaboration, social networks, extranets, websites, enterprise search and business intelligence. It also has system integration, process integration, and workflow automation capabilities. And that last part is where we in this book are interested in as Nintex Workflow uses this functionality.

One of the most used examples of a workflow in SharePoint is the approval of a document before it's available, this is called the publishing of a document.

Nintex Workflow 2010 can be installed on every version of SharePoint 2010 (foundation, standard or Enterprise) however Nintex features that require Enterprise functionality are not available with Foundation or Standard.

SharePoint Versions

For every SharePoint version there is also a Nintex Workflow version, this book uses the Nintex Workflow 2010 version. Besides this 2010 version they have also created Nintex Workflow 2007 for MOSS 2007 and Workflow 2013 for SharePoint 2013. The version for Office 365 is just called that: Nintex Workflow for Office 365.

Many organizations use SharePoint for Business process management as SharePoint is a flexible, adjustable and powerful system. If you combine this with the use of workflow management you get an even more powerful environment.

Workflow applications

If you want to create workflows in SharePoint you have a few options:

- You stick to the out of the box workflows;
- Create workflows with SharePoint Designer with or without Visio;
- Start using Visual Studio;
- Use a third party application like Nintex Workflow.

Out of the box workflows

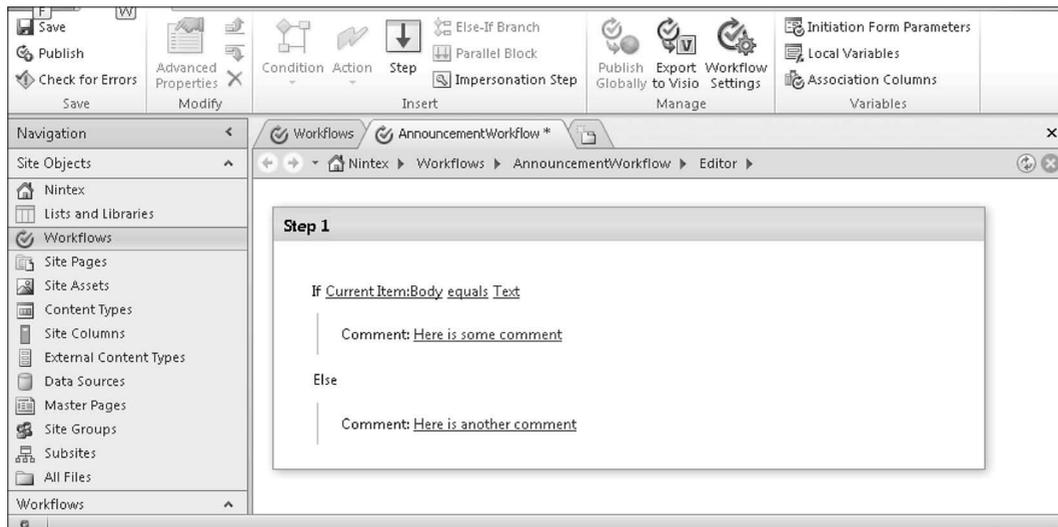
SharePoint has a few out of the box workflows that are available after activation of the features. These workflows are approval, approval for deletion and feedback on documents or pages. There is a three stage workflow but the options are very limited.



SharePoint Designer

With SharePoint Designer you can create workflows that do a better job than the out of the box workflows. You can create lookups and by using tricks, you can even create advanced SharePoint Designer workflows.

SharePoint Designer works via a line structured layout, every workflow action is on a separate line that makes managing these workflows daunting.



Microsoft Visio

In Microsoft Visio Premium 2010, you can create a workflow in Visio and then export it to Microsoft SharePoint Designer 2010. Business or process analysts who are familiar with flowcharting in Visio can use Visio to design a workflow that represents their business logic, export the workflow, and enable a site owner or IT professional using SharePoint Designer to implement it in SharePoint 2010.

Nice you think, the graphical overview of Visio combined with the workflow functionality of Designer, however there is a catch; Visio Premium is the version of Visio that ticks all the boxes of options and is therefore the most expensive. At the same time after importing the workflow in SharePoint Designer it becomes that same flat structured workflow as with the other designer workflows.

Visual studio

Most developers will say “workflows need to be created by Visual Studio, there you have all the control you want!” And if I was a developer I would say the same. But creating workflows with Visual Studio is a complex process and also requires a lot of knowledge of Visual Studio and the SharePoint foundation framework. That’s something you don’t want to ask from your users.

Modifying a workflow isn’t possible without Visual Studio and requires every time a full update of the workflow.

Third party applications

As you have seen in the above sections, creating and maintaining workflows via the standard products in SharePoint isn’t that easy. The learning curve to create workflows can be steep for end-users and the flexibility for changes is limited. And that’s where applications like Nintex Workflow do a great job in filling this gap; they lower the curve via easy interfaces and use smart variables to provide more flexibility. Some of these applications even adds functions that aren’t available in all other applications to deliver a true added value.

Why Nintex Workflow?

So there are other applications available that you can use to create workflows, there are applications that are free, applications that are easy, some are comprehensive others are built in. So why should you use Nintex? Here are a few options that we think make it worth using Nintex workflow.

Visual structure

When designing a workflow it is important to understand the flow and structure of your workflow. Therefore almost all users start their workflows in a program like Visio as they like to view the flow process. Being able to have a logical view is one of the best features of Nintex Workflow and this might even be the reason why users easily adapt to Nintex Workflow in comparison with SharePoint Designer that is a line based workflow designer.

Quick

Creating workflow via the visual drag and drop structure makes creating workflows with Nintex Workflow an easy and quick task. Actions are grouped together in logical sections and can be pre-filled saved. Templates can be used for standard workflows that users can use direct.

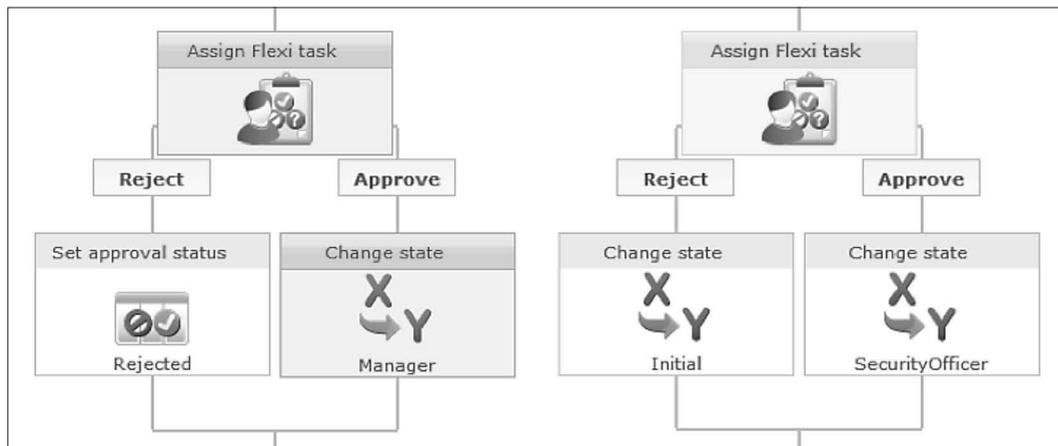
Instead of days, workflows are now created in hours.

Workflow history

Besides knowing how your workflow is going to run, it's also important to know how your workflow has run. Why did your workflow set a value? Why did the workflow return an error? This is what you use the workflow history for. Nintex Workflow provides a workflow history that uses a graphic overview of your workflow where with colors the steps that are taken are showed. The green actions are executed, the grey actions are ignored. If your workflow is running your actions are yellow.

Reporting

With the installation of Nintex Workflow you also get web parts that you can use for creating reports. These web parts display information such as: usage summaries, completed vs. error workflow or overdue workflows and can be configured to show this data in chart- or list- views. By adding the chart web part to your reporting pages you can get a quick overview of the status of your Nintex Workflow. There is also a handy web part that shows all running workflows awaiting your approval, perfect for the front-page of a portal!



LazyApproval

When you enable LazyApproval you can let your users respond to approval request directly from their e-mail. If a request for approval task is set to a user he almost always receive an e-mail message with a link to the task. After enabling LazyApproval the user only has to reply to the e-mail he receives with approve or deny in the header to approve or deny the task.

Nintex Live

Nintex Live is an online catalog from where you can download actions for use in your Office 365 or local environment. With Nintex Live you can extend your Nintex Workflow application with social features like Twitter, Facebook and LinkedIn. You can also add storage actions like Dropbox, Box or Google Drive, or use the online calculation functions from StrikeIron.

Nintex Live makes it possible to create a hybrid environment where your local SharePoint farm is connected to your Office 365 cloud solutions.

And maybe the best part is that the Nintex Live catalog continues to grow with new actions.

On site and online

The look, feel and functions are almost identical for Nintex Workflow on Office 365 and on site making it for end users easy to adopt to both versions. You could for example use an Office 365 environment with Nintex workflows to let your company collaborate with his partners and a local environment for your internal users only.

Nintex website

The website of Nintex contains a lot of information about Nintex Workflow and other Nintex products. If you want help with an action, more information, examples you can always have a look at <http://connect.nintex.com>. This is the site of Nintex where you can exchange ideas, tips & tricks.

Nintex versioning

Nintex is continually updating their software, adding new functions and improving exciting functionality to make Nintex Workflow an even better product. If you have selected software assurance with your Nintex purchase you always receive the latest version of Nintex Workflow and you can easily upgrade to a newer version.

Summary

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In this chapter we have looked at the introduction of Nintex Workflow. What is SharePoint and what is a workflow in SharePoint? Which workflow applications are there and how does Nintex compares to these and we have looked at the advantages of using Nintex Workflow.

One thing to remember:

*In the end it isn't about the features that are added,
but is about the value they add.*

3 • Setup and Administration

How do you setup Nintex Workflow?

In this chapter, we are going to install and configure Nintex Workflow in your environment. What are the steps that are required for installing the software and how do you configure it?

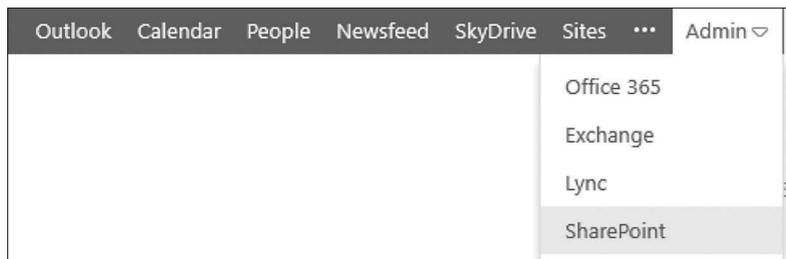
There is a difference in installing Nintex Workflow for Office 365 environment and installing it on a local farm. When using the Office 365 version you aren't actually installing any software, you are working with the app model of Microsoft SharePoint 2013. If you're installing Nintex Workflow on a local farm you are installing the software directly on the server. We start with the Office 365 setup.

Setup on Office 365

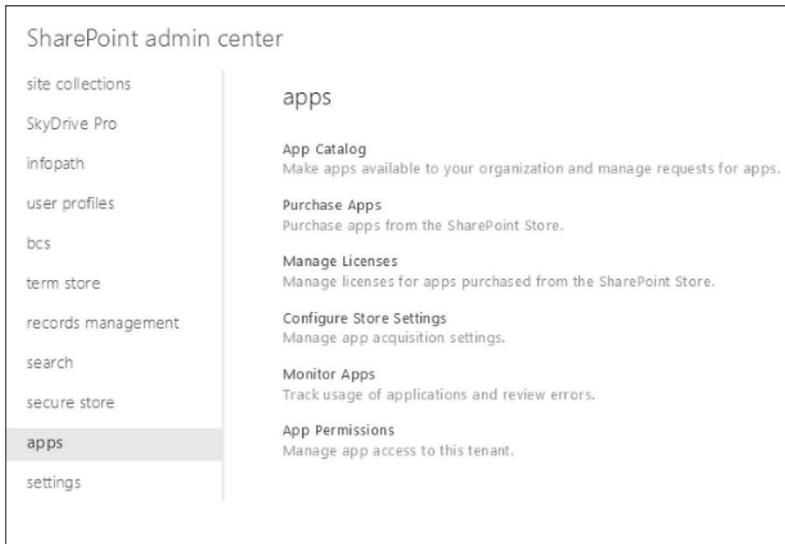
Nintex Workflow for Office 365 is hosted in the cloud using the new SharePoint App model. This means that SharePoint is hosted at a Microsoft datacenter and where Nintex Workflow is running at the datacenter of Nintex. They are maintaining the infrastructure so we can focus on building business processes.

If there isn't a site collection for apps this needs to be created first, any Office 365 administrator can create this.

To add Nintex Workflow as an app go to the SharePoint section of Office 365.



Choose apps from the left navigation and select then Purchase Apps



Select Workflow + Process Management from the left navigation and choose Nintex Workflow for Office 365.

