

# Nintex<sup>®</sup> Workflow for SharePoint<sup>®</sup>





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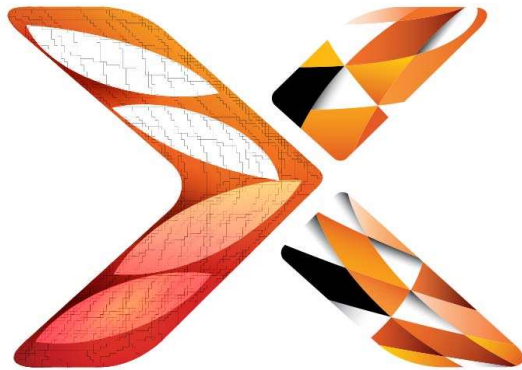
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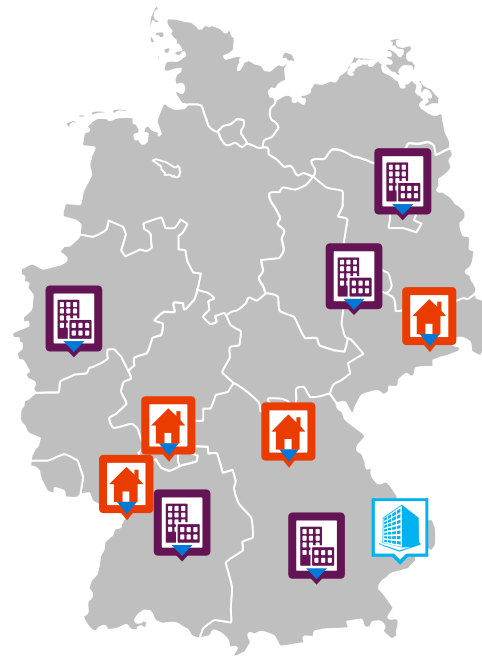




Wer sind wir?



# Wer waren wir?



## Stamm-Sitz

Burghausen



## Größere Niederlassung

Berlin  
Köln  
Leipzig  
München  
Stuttgart



## Geschäftstellen

Dresden  
Frankfurt/Main  
Karlsruhe  
Nürnberg



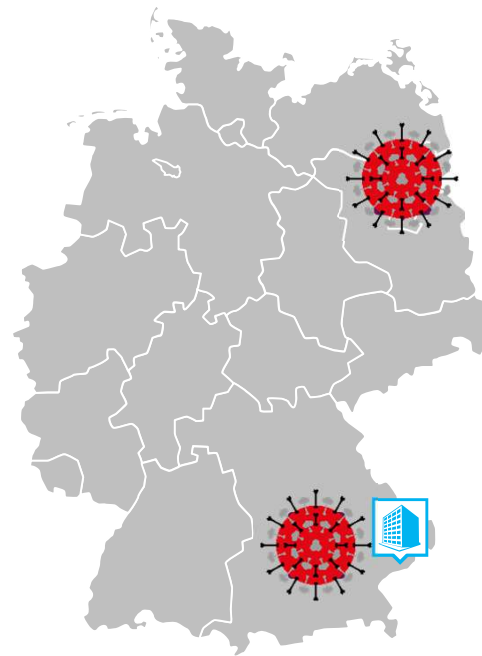
## Europäische Filialen

Wien  
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# Wer sind wir?



Stamm-Sitz

Burghausen



Größere Niederlassung

Berlin  
München

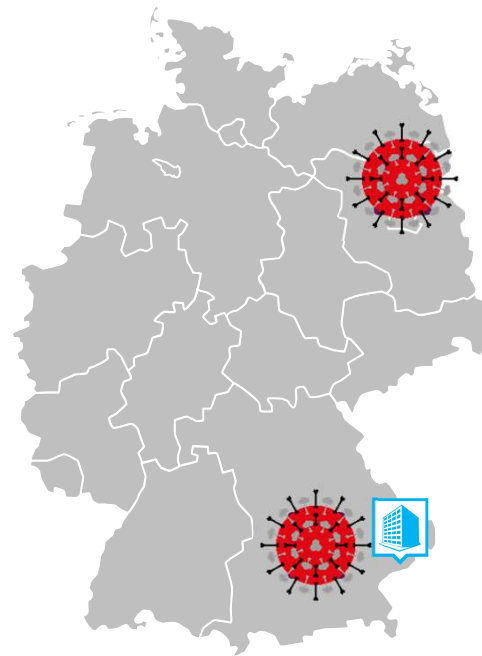


Europäische Filialen

Wien  
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# Wer sind wir?



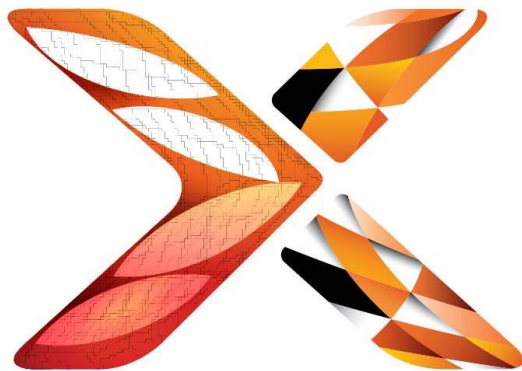
4 Standorte  
53 Mitarbeiter

Offene Schulungen  
Inhouse Schulungen  
Konferenzen  
Fachzeitschriften

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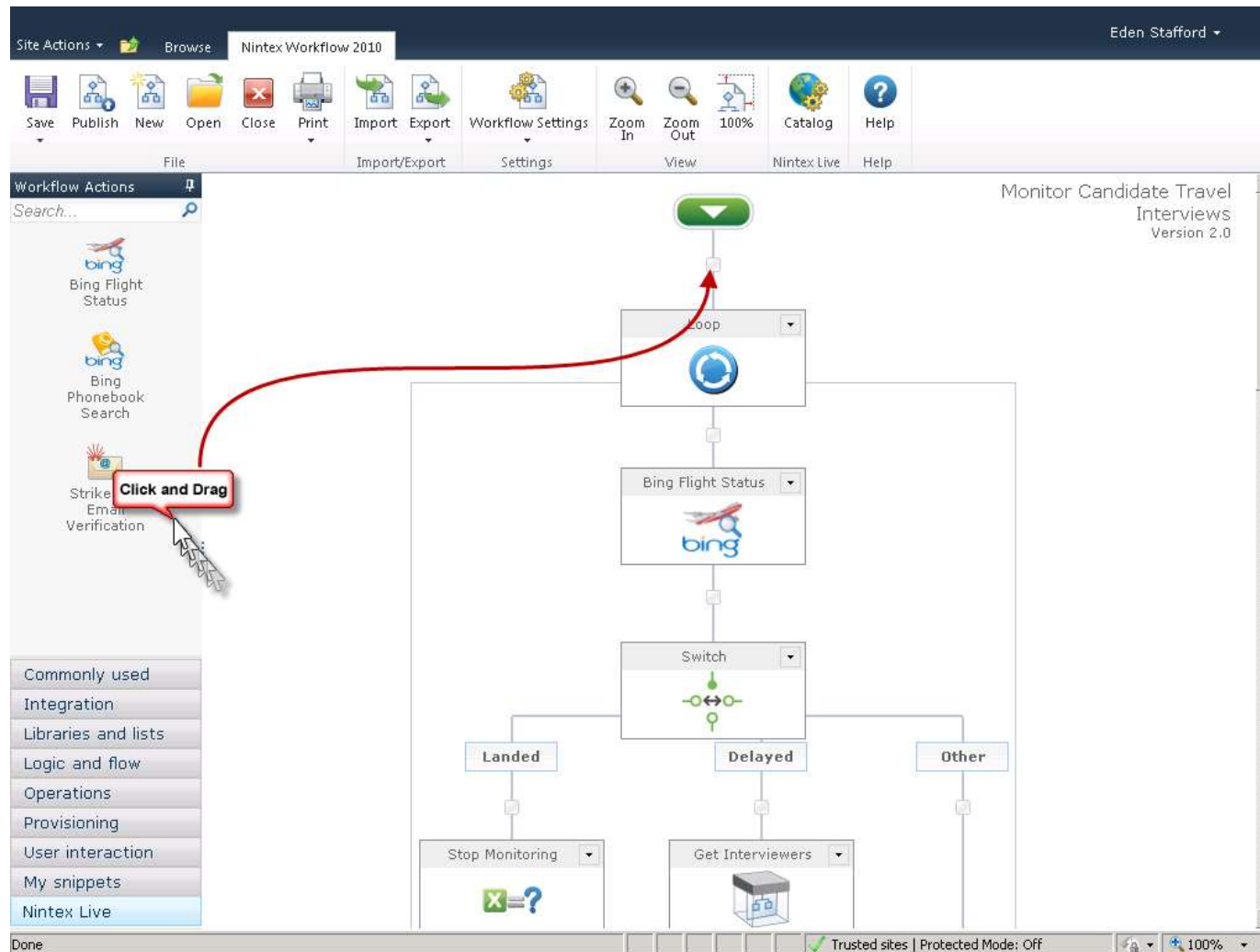
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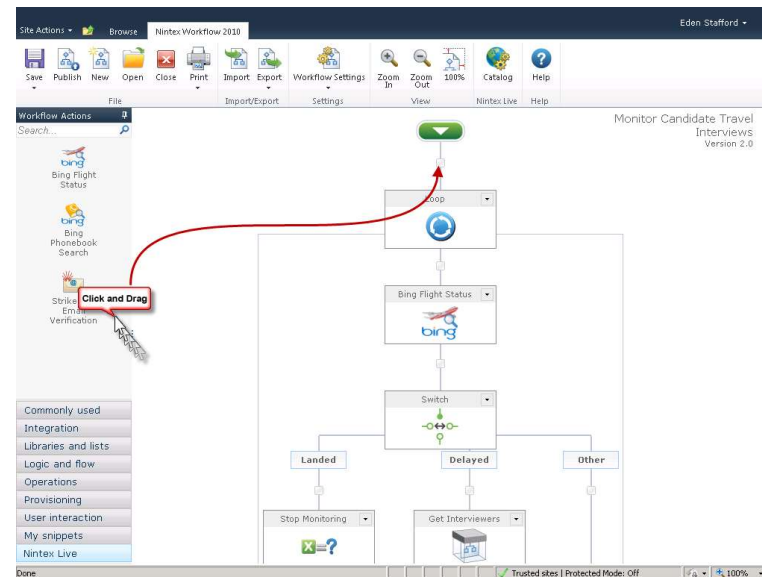
## Was ist Nintex?

# Was ist Nintex?

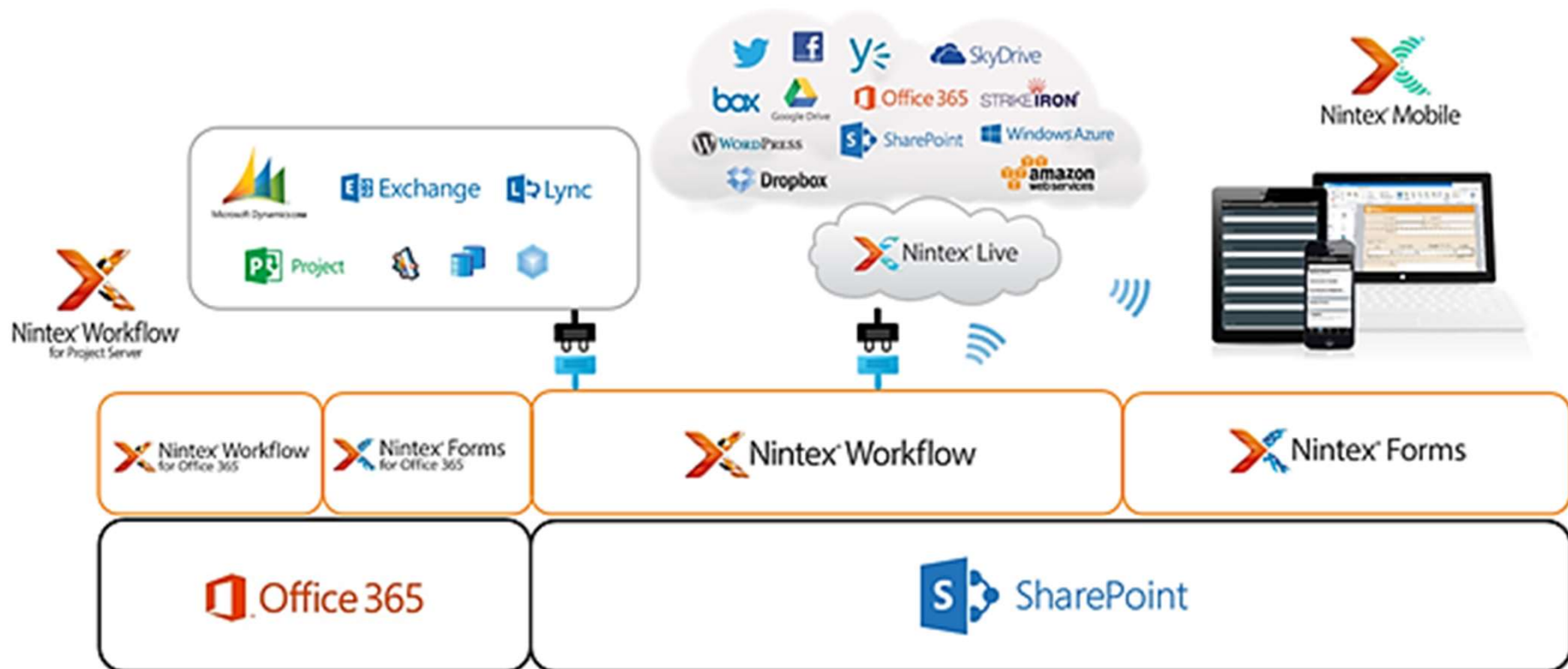




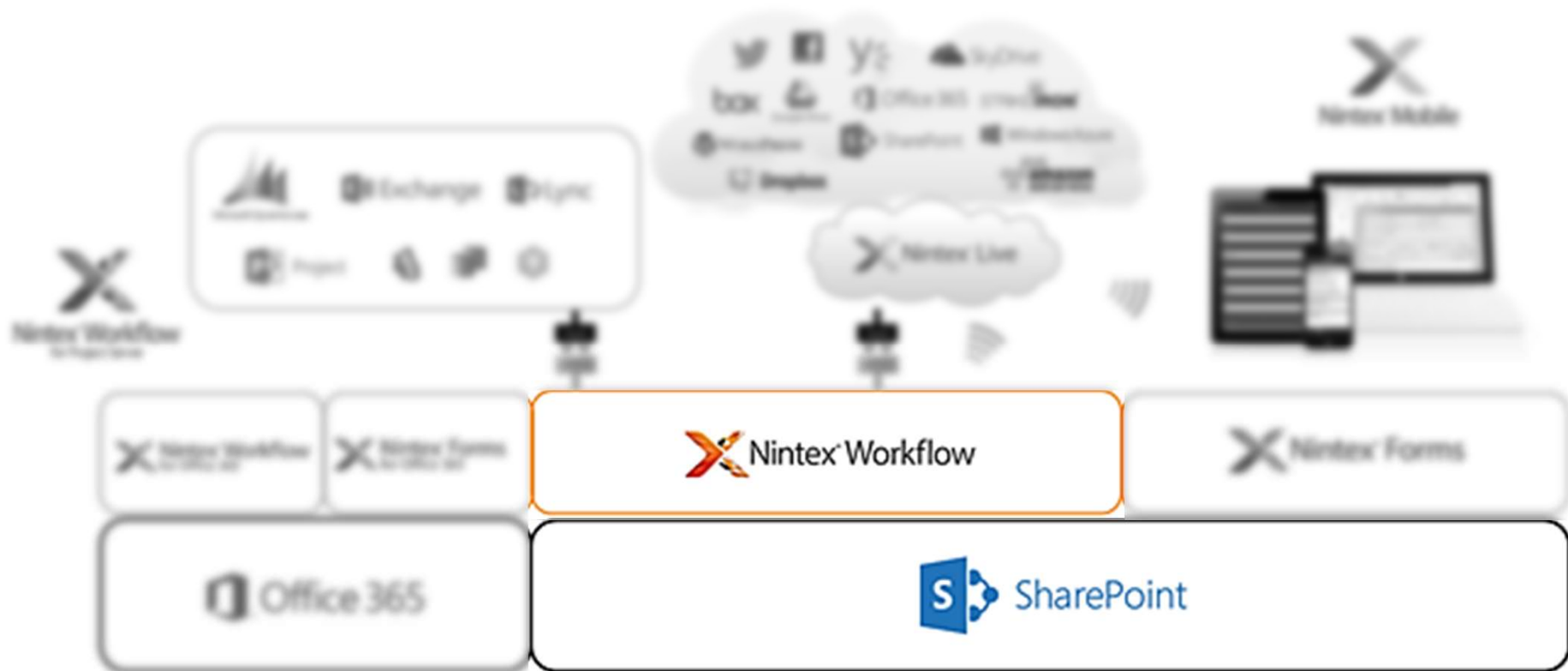
# Was ist Nintex?



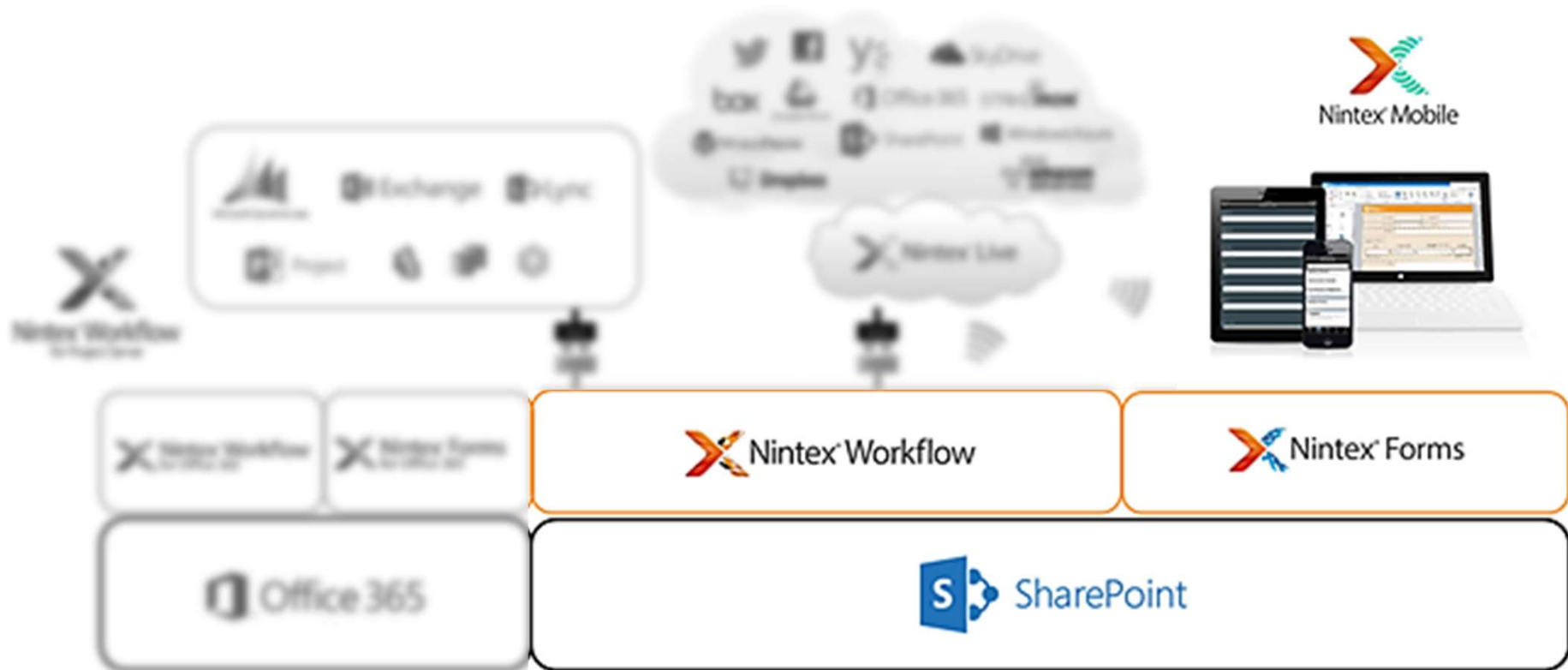
# Was ist Nintex?



# Was ist Nintex?



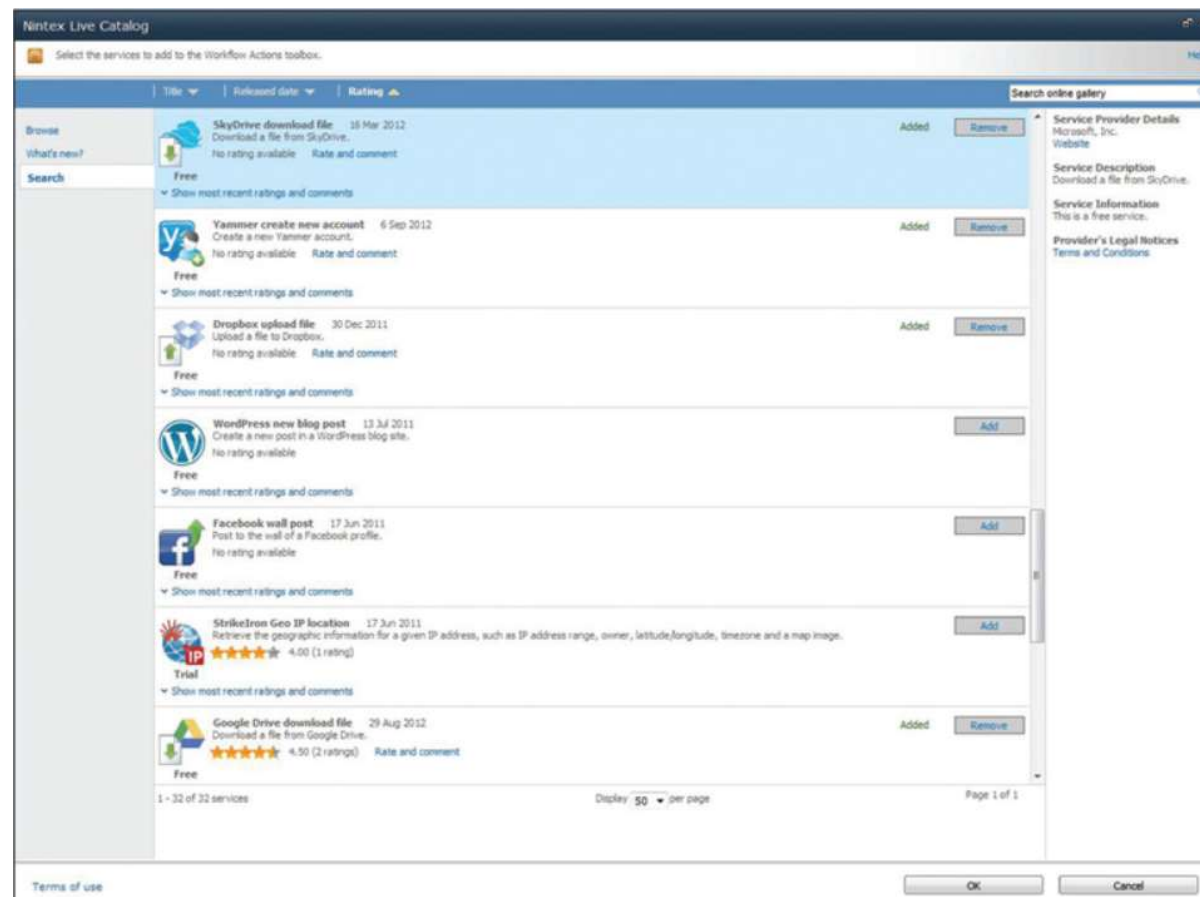
# Was ist Nintex?



# Was ist Nintex?



*Nintex Live*



# Was ist Nintex?



## *Nintex Forms Classic Design*

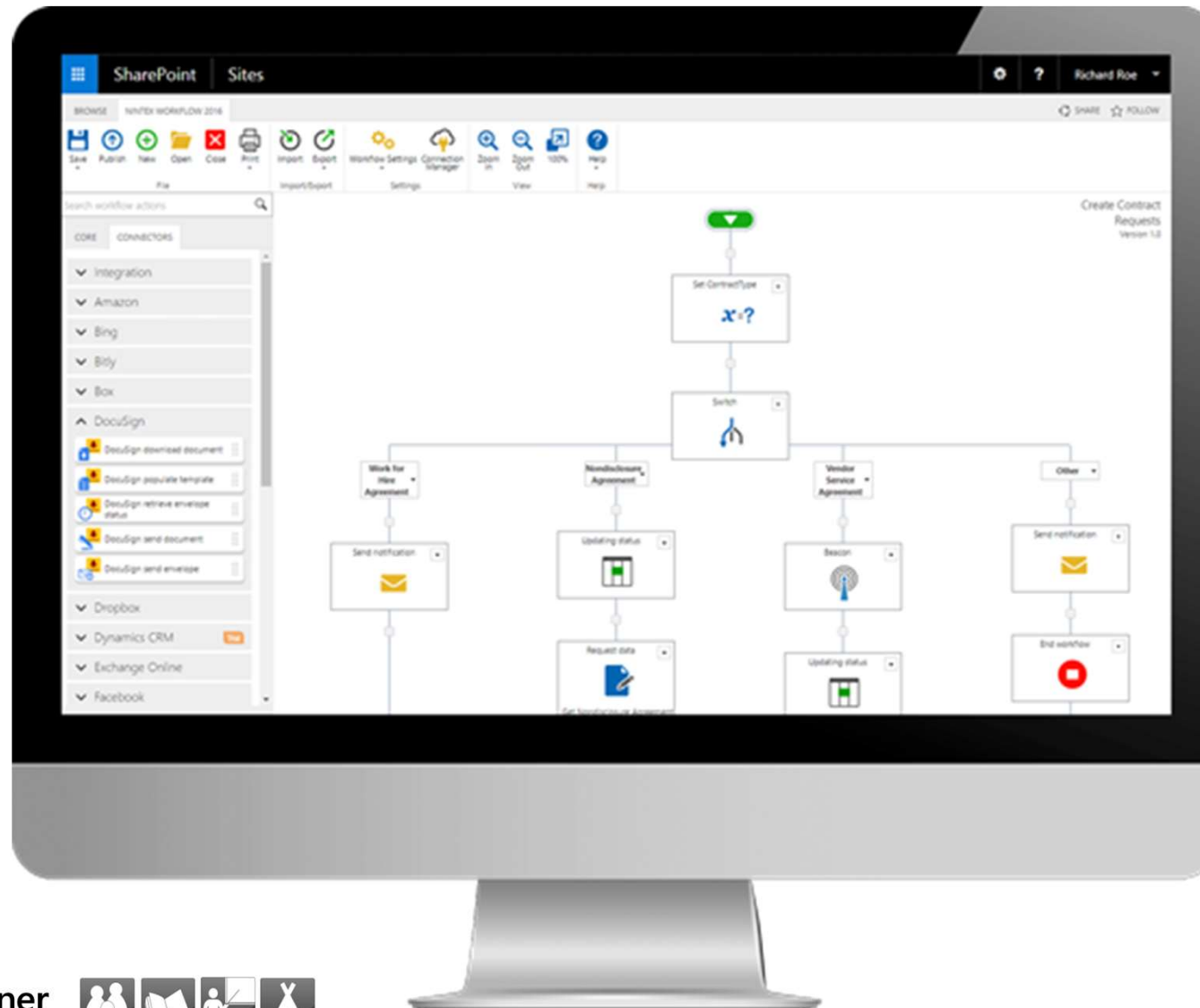
The screenshot shows the Nintex Forms Classic Design interface. On the left is a 'Form Controls' sidebar with a search bar and various control icons like Button, Calculated Value, Date/Time, Image, Label, Multi Line Textbox, Panel, and People. The main area displays a form titled 'Forms2013'. The form has a header bar with the Nintex logo. Below it are fields for 'First Name', 'Surname', 'Cost Center' (with a dropdown menu), and 'Status' (with a dropdown menu). There is also a 'Manager' field. Below these is an 'Expense Items' section with a table-like structure. The table has columns for 'Date', 'Expense Type' (with a dropdown), 'Description', and 'Amount'. There is a 'Project' dropdown in the 'Expense Type' column. Below the table is a 'Notes' section with a large text area. At the bottom, there is an 'Attachments' section showing two files: 'C:\Users\User\Documents\Recommendations.docx' and 'C:\Users\User\Documents\Estimates.xlsx', each with a 'Delete' button. The interface is in German.

The screenshot shows the Nintex Forms Responsive Design interface. The top bar is dark with the Nintex logo and 'Administrator' user. Below is a navigation bar with tabs for 'DURCHSUCHEN', 'NINTEX-FORMS', 'FREIGEBEN', and 'FOLGEN'. The main area displays a form titled 'Forms2013'. The form has a header bar with the Nintex logo. Below it are fields for 'Name' and 'Titel'. At the bottom, there are two buttons: 'Speichern' (Save) and 'Abbrechen' (Cancel). The interface is in German.

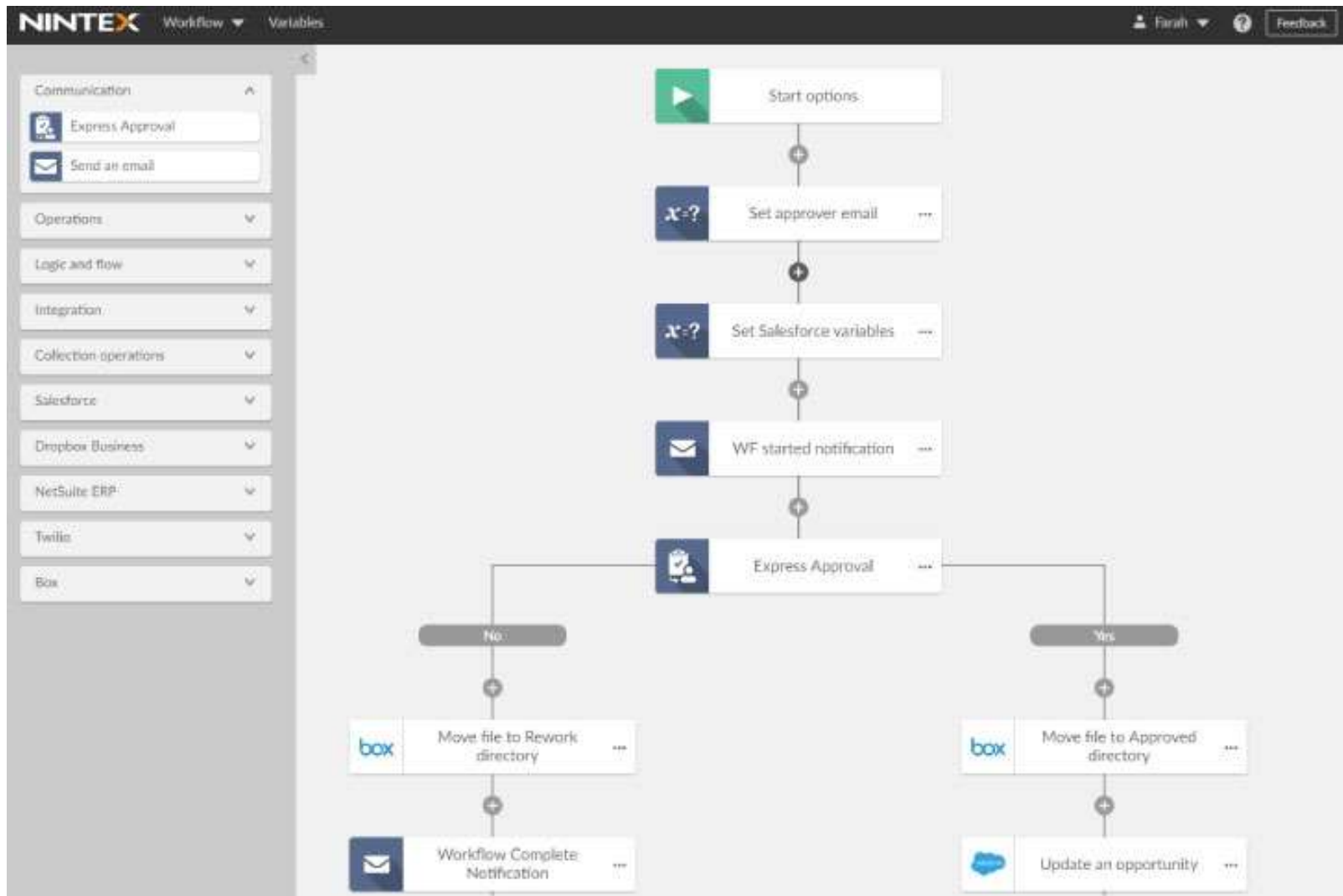
## *Nintex Forms Responsive Design*



# Was ist Nintex?



# Was ist Nintex?





# Was ist Nintex?



C Team Site » Add Apps »

USA \$ - English (United States) - ?



## Nintex Workflow for Office 365

from Nintex USA LLC

Find an app



Free

**ADD IT**

Good news - you already own this app.

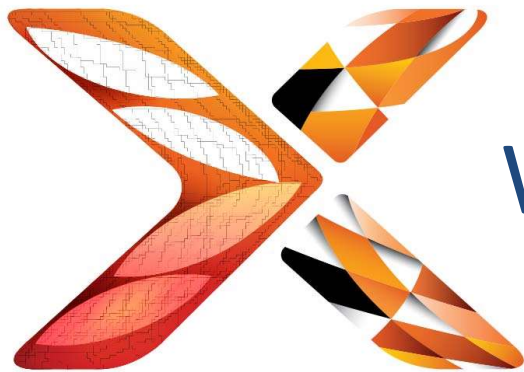
By acquiring this app you agree to its [permissions](#).

VERSION 1.0.1.0  
RATING ★★★★★ (10)  
RELEASE DATE September, 2013  
CATEGORY Workflow + Process Management, Productivity  
SUPPORT [App Website](#)

MORE ACTIONS -

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Was lernen wir hier?



- Installation von Nintex
- Bereitstellen der Services
- Aktivieren der Website(sammlungen)
- ListWorkflow versus WebsiteWorkflow
- Nintex Oberfläche

## Nintex Grundlagen

## Die Theorie hinter Nintex Workflows

- Workflow Arten
- Workflow Variablen
- Logic & Flow Actions
- Operational Actions
- Lists & Libraries

# Was lernen wir hier?



- Workflow Action Pane
- Workflow Action Items
- Workflow Settings
- Start-Optionen eines Workflows
- Optionen-Leiste einer Action

## Nintex Workflows

## Beispiel 1 Boolean Logic

- Setzen von Listen-Eigenschaften
- Feldwert (neu) setzen
- SharePoint-Darstellung
- Ausführen des ersten Workflows
- Auswerten durch Reporting-Funktionen

- Site-Workflow für UserDefined List
- Workflow-Variablen definieren
- Interne Protokoll-Funktionen
- Verwenden von Current.List.Item
- Starten und Auswerten des Workflows

## Beispiel 2 Auto Check-In



## Beispiel 3.1 Urlaubsantrag

- Liste : Urlaubstage
- Liste : Anträge
- Genehmigungsverfahren
- Resturlaub berechnen und eintragen
- Rückmeldung : "genehmigt"

- Zu wenig Urlaubsanspruch
- >> automatisch ablehnen
- MA möchte keinen Urlaub nehmen
- >> Rückbuchen des Urlaubsanspruchs
- >> Kontroll-Instanz einrichten

## Beispiel 3.2 Urlaubstorno

## Beispiel 3.3 Urlaubskalender

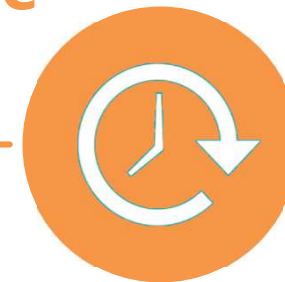
- Urlaubskalender als TeamSite Element
- Automatischer Kalender-Eintrag (genehmigt)
- Datum/Zeit in Nintex und SharePoint
- Kalendereintrag bei Storno löschen
- Auswertung und Optimierung(en)

# Was lernen wir hier?



- Urlaub mit State Maschine lösen
- SQL-Abfragen in Nintex gestalten
- Webservice mittels Nintex nutzen
- AufbewahrungsTags & Richtlinien
- User Defined Action (UDA) Panel

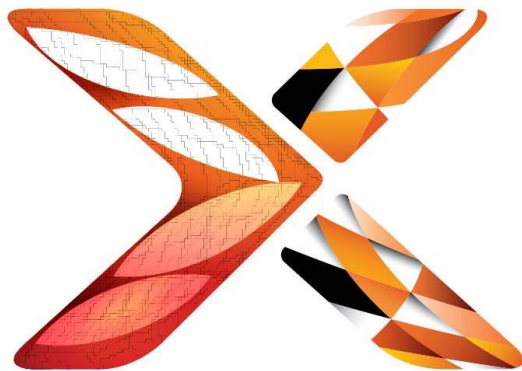
## Wiederverwendbare Nintex-Workflows



- Template versus Snippets
- BlackBoxItems via UDA

## Komplex-Bsp Ideensammlung





# Nintex-Theorie

# SharePoint Workflow vs. Nintex Workflow



	SharePoint Designer 2013	Nintex Workflow 2013
<b>Schleifen</b>		
Zählergesteuert	Ja	Ja
While	Ja	Ja
Foreach	Nein	Ja
<b>Integration</b>		
Active Directory	Nein	Ja
MS BizTalk	Nein	Ja
MS CRM	Nein	Ja
MS SQL	Nein	Ja
WebServices	Ja	Ja
XML	Nein	Ja
<b>Listen&amp;Bibliotheken</b>		
Add/Update/Delete von Elementen	Ja	Ja
Datei nach Netzlaufwerk kopieren	Nein	Ja
Dokument Konvertieren	Nein	Ja
Liste erstellen	Nein	Ja
Mehrere Listenelemente aktualisieren	Nein	Ja
<b>Wiederverwendbarkeit</b>		
Aktionen als Snippet zusammenfassen	Nein	Ja
Workflow als Template Speichern	Ja	Ja
<b>Websiteübergreifende Aktionen</b>		
Element in anderer SiteCollection erstellen	Nein	Ja
SiteCollection erstellen	Nein	Ja
Website erstellen	Nein	Ja





## Nintex Workflow Edition Comparison Table



Feature is in 2007, 2010  
and 2013 versions



Feature is available in  
all versions, and has  
been enhanced in  
2010 and 2013



Feature is only available  
in 2010 & 2013 version

**WORKGROUP****STANDARD****ENTERPRISE**

Quelle: [http://nintexdownload.com/Nsupport/NW\\_Edition\\_Comparison\\_Table\\_English.pdf](http://nintexdownload.com/Nsupport/NW_Edition_Comparison_Table_English.pdf)



# Editionsvergleich (1)



	WORKGROUP	STANDARD	ENTERPRISE
<b>INSTALLATION</b>			
Standalone Installation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Web Farm Installation		<input type="radio"/>	<input type="radio"/>
Licensed Team Sites	5 Site Activations	Unlimited	Unlimited
<b>DESIGNER</b>			
Drag and drop designer	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Print	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>
Zoom to view	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>REPORTING &amp; MANAGEMENT</b>			
User-based Workflow tracking web parts	Site level	Site level	Farm level
Summary statistics, report web parts and chart web parts			<input type="radio"/>
Individual workflow history and verbose logging option	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Log in the History List	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
User access control	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>
Workflow change approval	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>
<b>LOGIC &amp; FLOW</b>			
Action Set	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Loop, Switch, and Parallel Actions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Run If, Condition, and Filter	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
State Machine	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Quelle: [http://nintexdownload.com/Nsupport/NW\\_Edition\\_Comparison\\_Table\\_English.pdf](http://nintexdownload.com/Nsupport/NW_Edition_Comparison_Table_English.pdf)



# Editionsvergleich (2)



	WORKGROUP	STANDARD	ENTERPRISE
<b>USER INTERACTION</b>			
InfoPath form generation/support	⊕	⊕	⊕
Delegate Workflow Task	○	○	○
Create SharePoint Task	○	○	○
Approval, Review, and Multi Outcome Tasks	●	●	●
LazyApproval	○	○	○
Notifications and Reminders	●	●	●
<b>OPERATIONS</b>			
String, Date, and Math operations	●	●	●
Pause, Stop, and Wait for Update	○	○	○
<b>PUBLISHING</b>			
Copy to Fileshare, Copy to SharePoint	○	○	○
Submit to record center			○
<b>USER PROFILE MANAGEMENT</b>			
Query SharePoint User Profiles			○
Update SharePoint User Profiles			○
Create / Delete / Compile Audience			○

Quelle: [http://nintexdownload.com/Nsupport/NW\\_Edition\\_Comparison\\_Table\\_English.pdf](http://nintexdownload.com/Nsupport/NW_Edition_Comparison_Table_English.pdf)



# Editionsvergleich (3)



	WORKGROUP	STANDARD	ENTERPRISE
<b>SITES, LIBRARIES &amp; LISTS</b>			
Create / Delete Sites and Site Collections	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Check in / Check out / Cancel Checkout on items	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Create / Copy / Update / Delete an Item	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Create List	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Set Approval Status / Set Field Value / Set Item Permissions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>ACCOUNT PROVISIONING</b>			
Add / Remove User from AD Group			<input type="radio"/>
Create / Update / Decommission AD Account			<input type="radio"/>
Create / Remove AD Security Group			<input type="radio"/>
Enable Lync/OCS			<input checked="" type="radio"/>
Provision User on Exchange			<input type="radio"/>
<b>INTEGRATION</b>			
Nintex Live Actions*	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>
Dynamics CRM integration actions			<input type="radio"/>
Execute web service, Web Request, SQL, LDAP queries	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Query / Update XML	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Start / Stop other workflows	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>
Query the BDC / BCS			<input type="radio"/>
Query Excel Services			<input type="radio"/>
Word Services actions			<input checked="" type="radio"/>
Query Enterprise Search			<input type="radio"/>
Send / Receive BizTalk messages			<input type="radio"/>



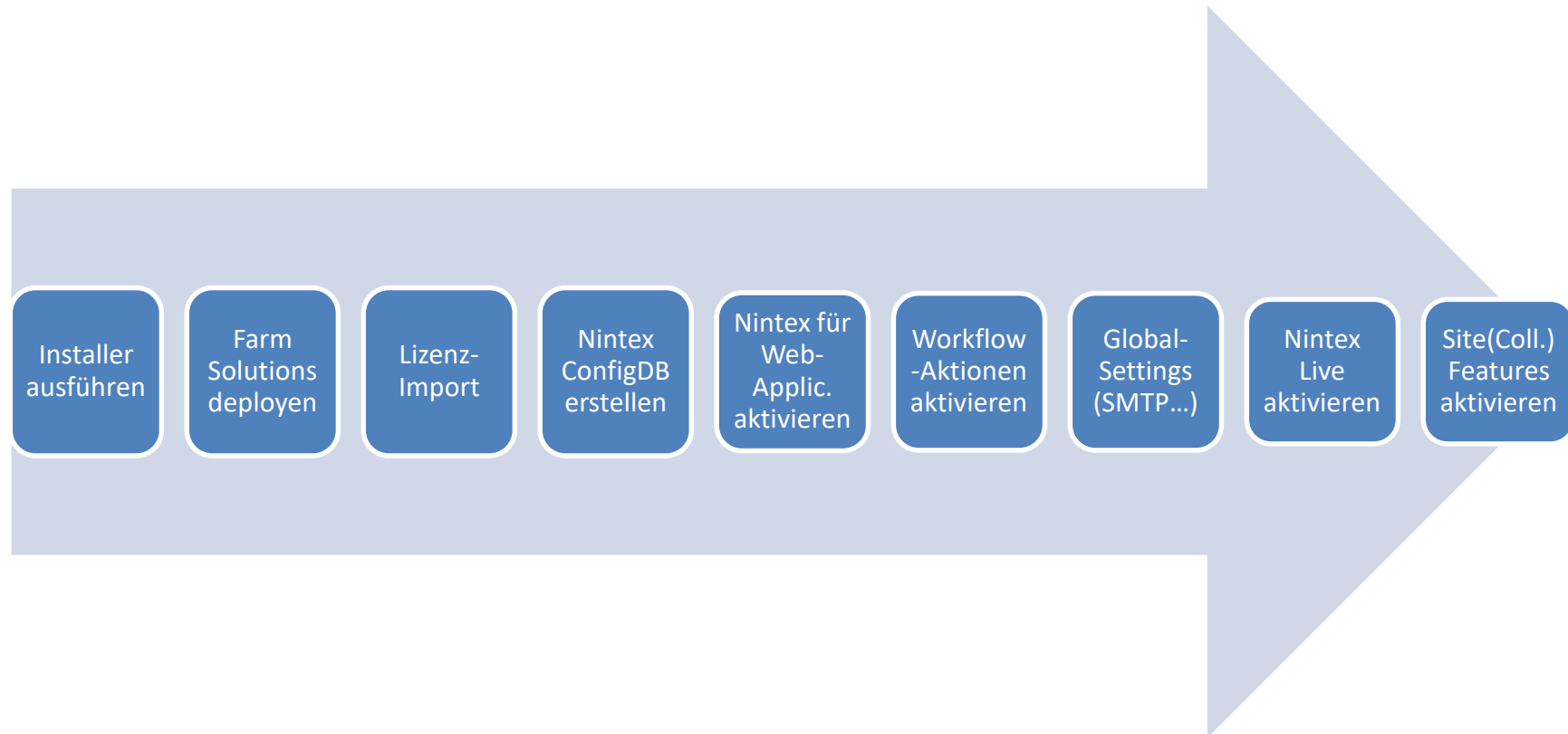
# Editionsvergleich (4)



	WORKGROUP	STANDARD	ENTERPRISE
<b>EXCHANGE SERVER INTEGRATION</b>			
Create Calendar Appointment			<input type="radio"/>
Create Outlook Task			<input type="radio"/>
Get meeting suggestions			<input type="radio"/>
<b>CUSTOMIZATION &amp; RE-USE</b>			
Content type, Reusable, and Site workflows	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>
User Defined Actions	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>
Custom context data	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>
Export to visual studio	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>
<b>DEBUG</b>			
Execute an action using Run Now	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>
Disable/Enable Actions in workflow	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>

Quelle: [http://nintexdownload.com/Nsupport/NW\\_Edition\\_Comparison\\_Table\\_English.pdf](http://nintexdownload.com/Nsupport/NW_Edition_Comparison_Table_English.pdf)





# Workflow Arten



Name	Scope Gebunden an	Beschreibung
Listenworkflow	Liste	Einfache Bereitstellung, aber unflexibel
(Globally) Reusable Workflow	Inhaltstyp	Wiederverwendbar auf Website- o. SiteCollection Ebene
Website Workflow	Website	Kein Current Item Context



# Workflow Arten



Name

Listenworkflow

(Globally) Reusable  
Workflow

Website Workflow

	Col A	Col B	Col C	Col D
current item				





## Name

Listenworkflow

(Globally) Reusable  
Workflow

Website Workflow

		selected property	
Col A	Col B	Col C	Col D

# Workflow Arten



Name
Listenworkflow
(Globally) Reusable Workflow
Website Workflow

			selected content type	
	Col A	Col B	sys column type	Col D
item of interest			Typ "Rechnung"	
item of interest			Typ "Rechnung"	



Name	Scope Gebunden an	Beschreibung
Listenworkflow	Liste	Einfache Bereitstellung, aber unflexibel
(Globally) Reusable Workflow	Inhaltstyp	Wiederverwendbar auf Website- o. SiteCollection Ebene
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# Wichtige Workflow Variablen













Name	Typ	Verwendung
Single (multiple) line(s) of alphanumeric text	String	Speicherung von Texteingaben
Number	Double (Fließkommazahl)	Berechnungen
Integer	Integer (Ganze Zahl)	Index Counter
Yes/No	Boolean	Flags / Zustände
Person or Group	Lookup	Auswahl von Personen
List Item ID	Integer	Referenz auf Listenelement (z.B. Task)
Action ID	Integer	Referenz auf Vorgang (z.B. Approval)
Collection	Stack bzw. eindimensionaler Array (Sammlung mehrerer Variablen eines Typs)	For-Each Loops, Collection Operation



# Wichtige Workflow Actions – Logic & Flow









Icon	Name	Verwendung
 Action set	Action Set	Container zum Gruppieren von mehreren Aktionen (auch als Snippet speicherbar)
  Filter Run if	Filter / Run if	Setzen von Bedingungen / Container, welcher nur bei zutreffender Bedingung ausgeführt wird
  For each Loop	For each / Loop	Schleife zur Iteration durch Collection Variable / While-Schleife (in Abhängigkeit von Bedingung)
 Run parallel actions	Run parallel actions	Führt mehrere Zweige parallel aus
  Set a condition Switch	Set a Condition / Switch	If-Else-Verzweigung / Mehrfachverzweigung
  State machine Change state	State machine / Change State	Zustandsautomat / Wechseln in anderen Status

Actions können heraufgestuft werden („Run as“ Workflow Owner), aber nur auf „root“-Ebene, d.h. nicht innerhalb z.B. eines „Action set“ Containers



# Wichtige Workflow Actions – Operations









Icon	Name	Verwendung
 Collection operation	Collection Operation	Stack Operationen auf Collection-Variablen (Add, Remove, Get, Count...)
 Regular expression	Regular Expression	Textmanipulation mit Regular Expressions (Replace, Match, Split, Extract)
 End workflow	End Workflow / Terminate	Beendet diesen Workflow / Beendet andere Workflows am aktuellen Element
 Terminate workflow		
 Convert value	Convert Value	Umwandlung Text in Zahl - „String to Int“
 Calculate date	Calculate Date	Berechnung eines Zieldatums durch Hinzufügen einer Zeitspanne zu Datumswert
 Store data	Store data / Retrieve data	Wert in Workflowvariablen speichern / abrufen (Workflow übergreifend)
 Retrieve data		

Achtung: „Set Workflow Variable“ bezieht sich auf das setzen der Variable für diese WF Instanz. Store Data kann die Daten auch anderen Instanzen zur Verfügung stellen



# Wichtige Workflow Actions – Lists & Libraries



Icon	Name	Verwendung
 Create item in another site	Create Item in another site	Element auf anderer Site(Collection) anlegen
 Update multiple items	Update multiple Items	Elemente auf anderer Site(Collection) ändern
 Set item permissions	Set item permissions	Berechtigung für bestimmte Elemente festlegen
 Query list	Query List	Listenelemente von aktueller oder anderer Site(Collection) abrufen
  Set field value    Update item	Set field value / Update item	Update auf aktuelles Listenelement / Update auf bestimmtes Listenelement

„Set field value“ u.a. auf das aktuelle Element bezogene Aktionen sind nicht im SiteWorkflow verfügbar, da dieser keinen „Current Item Context“ besitzt.



- Offizielle Website  
<http://www.nintex.com/workflow>
- Offizielles Community Forum  
<http://connect.nintex.com/forums/default.aspx>
- Downloads (Installation Guide, How To's, Manuals)  
<http://connect.nintex.com/files/51/default.aspx>
- Blog / Insidertipps zu Nintex Workflow / Nintex Forms  
<http://www.vadimtabakman.com/>



Noch Fragen



Andreas Stefan Jürgen Krause



[andreask@ppedv.de](mailto:andreask@ppedv.de)



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[.../in/andreas-krause-mct](https://www.linkedin.com/.../in/andreas-krause-mct)

