



Topics

- § An Introduction
- § Workflow Authoring – A Comparison
- § Nintex Workflow Features
- § Architecture & System Requirements
- § Editions and Licenses
- § Q&A





What is Nintex Workflow 2007?



An Introduction

In a Nutshell

“Nintex Workflow 2007™ extends SharePoint 2007 and SharePoint Designer to provide advanced workflow capabilities via a graphical web based interface embedded within SharePoint”



Background Information

- § Developed by **NINTEX** an Australian based company
- § Predecessor is SmartLibrary 2.1 designed for SPS 2003/ WSS 2.0
- § Achieved Microsoft Windows 2008 Certification status
- § Built on Windows Workflow Foundation (WF) – SharePoint's workflow engine



Why Nintex Workflow?



Workflow Authoring - A Comparison

Workflow Authoring – A Comparison

Workflow Authoring Methods	Disadvantages	Nintex Workflow Advantage
Out-of-the-box MOSS workflows	- Workflow is predefined. No flexibility to allow modification of workflow steps	- Enable users to create own workflows to suit their needs
SharePoint Designer	- Limited to a set of actions and conditions - Requires knowledge in using SPD to connect and publish workflows to SharePoint	- Expandable actions library using custom actions - Does not require external client to create and publish workflows
Visual Studio	- Requires high technical level to code workflows	- User friendly UI with drag and drop ability

Workflow Authoring – A Comparison

§Full Power of .NET, WF, etc.
§Significant complexity, development time

Visual Studio

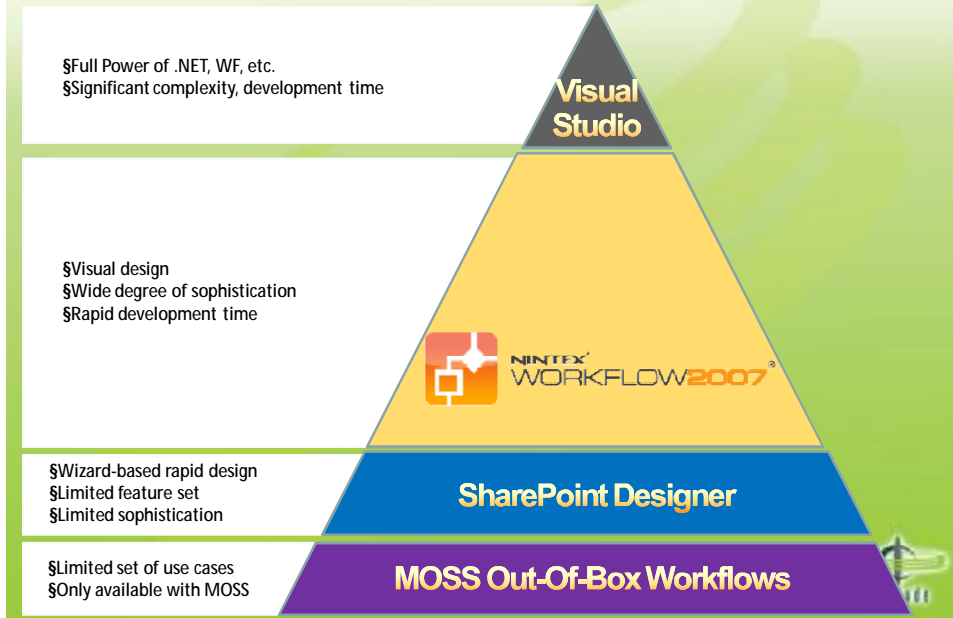
§Wizard-based rapid design
§Limited feature set
§Limited sophistication

SharePoint Designer

§Limited set of use cases
§Only available with MOSS

MOSS Out-Of-Box Workflows

Workflow Authoring – A Comparison



Empowering People

- Workflow for Everyone
- Design, Publish, Track and Report
- Ease of Installation and Deployment
- Build complex workflow processes in SharePoint, quickly and easily.
- Connect SharePoint to Enterprise Systems





What can Nintex Workflow do?



Nintex Workflow Features

Nintex Key Features

Graphical Workflow Interface

Integrated into SharePoint

Auto-delegation (out-of-office)

Nintex LazyApproval™

Out-of-the-box Templates and Workflow Actions

Custom Actions Extensibility





Graphical Workflow Interface



Nintex Workflow Features

Graphical Workflow Interface

- § Easy to use drag and drop workflow designer
- § Low technical level expertise required
- § Quick creation of workflows:
 - § Create workflow by drag and drop available actions
 - § Save workflow snippets/templates to be reused within the web application
 - § Import/Export workflow to be reused in other web applications



Graphical Workflow Interface

The screenshot shows the Nintex Workflow Designer interface. On the left, a sidebar titled "Workflow Actions" lists various activities: "Set a condition", "Request approval", "Send a notification", "Integration", "Libraries and lists", "Logic and flow", and "Operations". The main workspace, labeled "Workflow authoring space", displays a visual workflow diagram. The diagram starts with a "Start" node, followed by "Send Initiator Receipt" (with an envelope icon), "Leave request received", and "Manager Approval" (with a person icon). From the "Manager Approval" node, there are two paths: one for "declined" (with a red 'X' icon) leading to "Email Initiator", and one for "approved" (with a green checkmark icon) leading to "HR Approval".

Workflow Actions – activities that can be used for constructing workflow

Workflow authoring space

Graphical Workflow Interface

§ Visual workflow progress

The screenshot shows the "Workflow Information" panel on the left, displaying details for a workflow named "Project Alpha/Alpha Campaign.doc". The main workspace shows a visual workflow diagram with color-coded action boxes. A "Start" node leads to a green box "Create ID", followed by another green box "Update an item". Below these is a yellow box "More than \$10,000" with a decision diamond icon. From this decision box, two paths emerge: one leading to a grey box "Copy to SharePoint" and another leading to a yellow box "Request approval" with a person icon. Below the "Request approval" box is another grey box "Copy to SharePoint".

Green action boxes represents completed/approved actions

Yellow action boxes represents pending actions

Red action boxes (not shown here) represents rejected actions

Grey action boxes represents actions that did not/ yet to occur

Graphical Workflow Interface

§ Web parts for tracking workflow tasks

§ My Workflow Tasks

§ List of workflow related tasks assigned to the logged on user

§ Status is represented with traffic light icons – interval of icon color change can be set by user

My Workflow Tasks			
Item	Workflow	Status	Waiting time
Marketing Campaign for Germany.doc	Document Publishing WF		11/16/2008 12:31 PM
Current action: Request approval			

§ Workflows I've Started

§ List of workflows started by the logged on user

§ Able to filter by status

All Workflows I've Started				
Item	Workflow	Initiated	Initiated / Completed	Current status
Marketing Campaign for Germany.doc	Document Publishing WF	11/16/2008 11:11 AM	11/16/2008 11:11 AM	Completed
Project Product release for Germany.doc	Document Publishing WF	11/16/2008 11:14 AM	11/16/2008 11:14 AM	Waiting approval
Project Product release for Germany.doc	Document Publishing WF	11/16/2008 12:00 PM	11/16/2008 12:00 PM	Completed



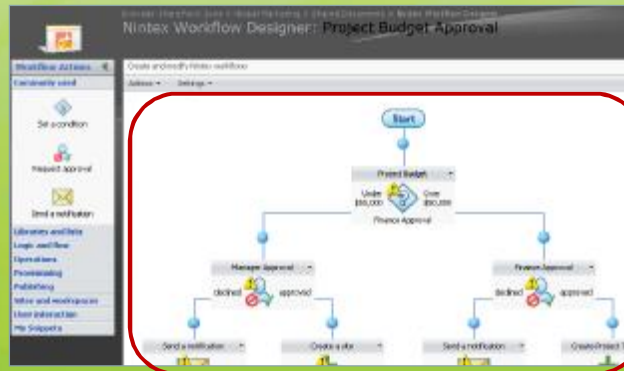
Integrated into SharePoint



Nintex Workflow Features

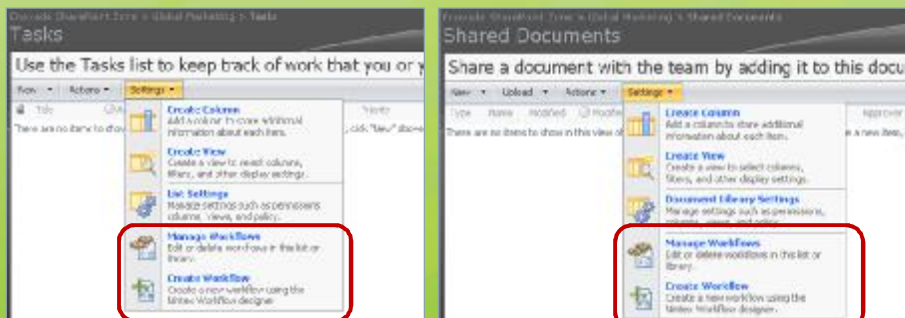
Integrated into SharePoint

- § Web-based solution, single familiar environment
- § Workflow designer workspace is within document library/list



Integrated into SharePoint

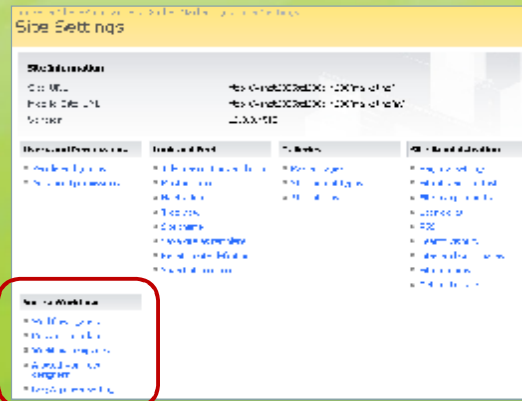
- § Functionalities embedded into SharePoint
- § Workflow functions are attached to document libraries and lists



Integrated into SharePoint

§ Functionalities embedded into SharePoint

§ Nintex Workflow settings is accessible from Site Settings page

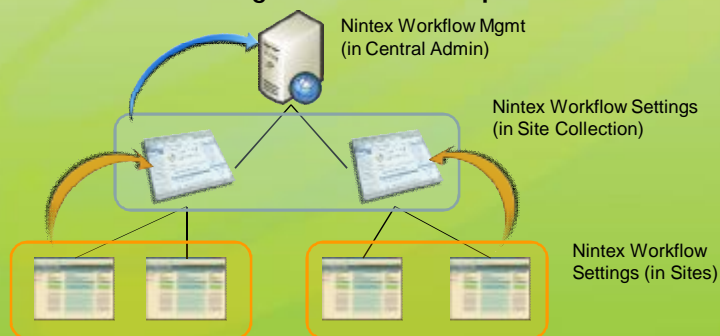


Integrated into SharePoint

§ Settings inheritance

§ Shares same parent site inheritance concept as SharePoint

§ Workflow settings inherits from parent site



Auto-delegation



Nintex Workflow Features

Auto-delegation

- § Auto-Delegation by Duration
 - § Similar to “out-of-office” function
 - § Enables delegation of all task during the specified duration
 - § Only new tasks assigned after a new delegation record is created will be delegated to the new user

Delegate Tasks

Use this page to delegate your tasks to another user between specific dates:

From midnight on *

Until midnight on *

Delegate To *

Scope For this teamsite only

OK Cancel

Specify duration and person to delegate to.
Scope by default is for entire site collection unless stated “For this teamsite only”





Nintex LazyApproval™



Nintex Workflow Features

Nintex LazyApproval™

- § Enable approvers to approve/reject item via email
- § Approvers only need to reply-to the email requesting for approval using allowed terms on the first line of the reply
- § Benefits:
 - § External users can be assigned as the approver.
Access rights to the system not required
 - § More flexibility for out-of-office approvers



Nintex LazyApproval™

§ Configurable for each “request approval” action

To enable LazyApproval, the feature must be enabled during workflow creation



Nintex LazyApproval™

§ Administrators can manage list of terms that LazyApproval will recognize

§ Configurable for each site

Phrase	Outcome
approved	Approve
decline	Deny
declined	Deny
no	Deny
ok	Approve



Out-of-the-box Templates



Nintex Workflow Features

Out-of-the-box Templates

§ Templates for common processes

§ Nintex provides many OOB workflow templates of common business processes

Blank			
Business Management / Finance			
Human Resources			
Operations and IT			
Project Tracking / Product Management			
Sales / Marketing			




Out-of-the-box Workflow Actions

User interaction	Libraries and lists	Integration	Operations	Logic and flow	Provisioning
<ul style="list-style-type: none"> Delegate Workflow Task Request approval Request review Send a notification Task reminder 	<ul style="list-style-type: none"> Cancel Checkout Check in item Check out item Copy on item Create an item Create List Delete an item Log in the history list 	<ul style="list-style-type: none"> Call web service Execute SQL Query LDAP Query XML Send / Receive B2/Talk Start Workflow Set approval status Set field value Set Item Permissions Update an item 	<ul style="list-style-type: none"> Build dynamic string Calculate a date Delay for... Delay until... End the workflow Math operation Regular expression Set a variable Wait for an item update 	<ul style="list-style-type: none"> Action Set Change State Filter Loop Run If Run parallel actions Set a condition State Machine 	<ul style="list-style-type: none"> Add User to AD Group Create AD Account Create AD Group Decommission AD Account Enable L2S/OCs Provision User on Exchange Remove User from AD Group Update AD Account

Categories: User interaction, Libraries and lists, Integration, Operations, Logic and flow, Provisioning.

Sub-categories: Publish, Sites and workspaces.



Custom Actions Extensibility

Nintex Workflow Features



Custom Actions Extensibility

- § Nintex SDK is available to create custom actions
 - § Custom actions consists of:
 - § Workflow Activity
 - § Nintex Action Adapter
 - § Configuration dialog page
 - § Nintex Action import configuration file (.nwa)
 - § A Nintex Custom Action Project Template is downloadable to assist in development
 - § Once developed, custom actions can be imported into Nintex



Custom Actions Extensibility

- § Importing custom actions
 - § Deploy workflow activity and adapter assemblies to GAC
 - § Place dialog page into CustomActions folder in Nintex Workflow layouts folder in SharePoint
 - § Import the .nwa file into Nintex allowed actions library



Custom Actions Extensibility

§ Adding custom action into Nintex

The screenshot shows the 'Add Workflow Action' page in the Nintex Central Administration console. The breadcrumb trail is 'Central Administration > Application Management > Manage Allowed Actions > Add Action'. The page title is 'Add Workflow Action'. Below the title, there is a section 'Manage Allowed Actions' with a red box around the text: 'Use this page to manage the Nintex Workflow actions allowed for the current Farm'. A table lists existing actions, with a red box around the 'Execute SQL' row. A callout box points to the 'Add Action' button, stating: 'Click to open browser dialog. Location and upload the .nwa file. Once added, the custom action is shown in Allowed Actions list'. Below the table, there are fields for 'Category' (set to 'Custom Actions'), 'Description' (set to 'Executes a SQL script'), and 'Activity Type' (set to 'MyCompany.NWAAdapters.ExecuteSqlActivity').

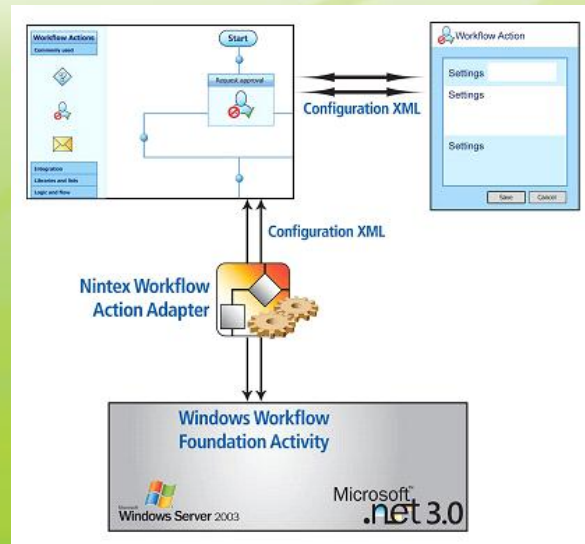
Category	Name	Description	Enabled
Custom Actions	Execute SQL	Executes a SQL script	<input type="checkbox"/>

How does Nintex work?

Architecture & System Requirements



Architecture



System Requirements

For Nintex Workflow 2007 installation:

- Windows SharePoint Services 3.0

OR

- Office SharePoint Server 2007

How can I obtain Nintex Workflow?



Editions & Licenses

Nintex Editions & Pricing

Workgroup Edition

- ✓ provides the same features as the Standard Edition
- ✓ Up to 5 concurrent site activations

Standard Edition

- ✓ provides advanced workflow capabilities via a graphical web based interface embedded within SharePoint
- ✓ License per front-end server basis

Enterprise Edition

- ✓ Extends workflow capability providing integration with Microsoft BizTalk and key line of business systems such as SAP and Siebel
- ✓ License per front-end server basis



Enterprise Edition Features

Account Provisioning

- Add User to AD Group
- Create AD Security Group
- Decommission AD Account
- Enable LCS/OCS
- Provision User on Exchange
- Remove User from AD Group
- Update AD Account

Integration

- Query BDC
- Query Excel Services
- Query MOSS Enterprise Search
- Send/Receive BizTalk
- Submit to Record Center

User Profile Management

- Query, Update MOSS User Profiles
- Create, Delete Audience

Reporting

- Workflow Statistics



Summary

- § It's Easy
- § It's Powerful
- § It Talks to Everything
- § It Will Save You Money
- § It Makes SharePoint Better



Q&A



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