

Get Nintex Right

Course outline

One day in-house event -
no Nintex experience
required

1. Intro to Nintex Forms

- ▶ forms are created and published
- ▶ how these can be matched to devices and screen sizes
- ▶ conditional data entry
- ▶ adding child items to a form
- ▶ adding barcode, photos and GPS information
- ▶ the skills required to do good forms
- ▶ how forms get connected to lists or libraries

2. Intro to Nintex Workflow

- ▶ Create a simple workflow
- ▶ View more complex ones
- ▶ Visual representation of a workflow - for building it and using it
- ▶ Experience a workflow as a user and options you have

- ▶ Use of email for progressing workflows
- ▶ Workflow actions and the Flexitasks
- ▶ State Machine workflow concepts, example and usage
- ▶ Snippets - reusing pieces of a workflow

3. What Nintex is good at, and not

- ▶ Making business process much more user friendly for key managers and users (so they adopt and support them)
- ▶ Pack more info into a screen with a well designed form
- ▶ Good user experience for different devices and audience - including customers
- ▶ Leveraging Active Directory
- ▶ On-boarding staff - automated set up on security and other actions, saves time and increases efficiency
- ▶ Business processes between systems
- ▶ Customer application forms, submissions, service requests and feedback

- ▶ Field operations - Photo; GPS; Bar code; QR
- ▶ Query and return data in user friendly format

4. Your business priorities & business case

- ▶ Determine what they are

“Ignition” solutions that pay for the Nintex upfront costs:

- ▶ How to position them, but manage expectations
- ▶ Gaining support

“Follow-on” solutions:

- ▶ Point solutions that between them have a big impact on risk, productivity, service and hassle
- ▶ For example finding and eliminating paper processes and forms

5. Skills and experience; In-house or out-source?

What roles and experience are needed to roll-out and sustain Nintex solutions:

- ▶ Creating forms
- ▶ Facilitating and doing the “business” design
- ▶ Facilitating and doing the Nintex configuration
- ▶ Systems architecture related
- ▶ SharePoint information architecture related

- ▶ Integration with other systems and the ICT environment

How to get people competent if you wish to have these in house:

- ▶ Creating forms
- ▶ Facilitating and doing the “business” design
- ▶ Facilitating and doing the Nintex configuration

6. Tactics for Implementing Nintex Right

- ▶ prioritising solutions and weeding out unsuitable candidates?
- ▶ how much functionality?
- ▶ who to involve, when
- ▶ get the business process right first
- ▶ change management - energising and working with people
- ▶ creating and sustaining design rules and patterns
- ▶ governance roles and processes
- ▶ integrating into your digital workplace designs

7. Forming your Roadmap with our Decision DNA model

Using our “Decision DNA” model, we will work through key questions about how you implement.

These form the framework for your roadmap and business case.



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