

Nintex Process Automation Essentials

Course Description

This course provides a comprehensive overview of process automation using the Nintex Process Platform. Participants will learn to configure and utilize Nintex Automation Cloud, design and build workflows, create forms, employ various actions, and deploy workflows effectively. Through hands-on labs and practical exercises, participants will gain the skills necessary to automate processes efficiently and streamline business operations.

Audience

This course is designed for professionals involved in business process management, IT professionals, SharePoint administrators, and anyone seeking to streamline and automate workflows within their organization.

Pre-requisite Knowledge/Skills

Familiarity with basic workflow concepts and SharePoint is recommended but not required. Participants should have a basic understanding of business processes and a willingness to learn.

Course Objectives

Upon completion of this course, participants will be able to:

- Understand the principles and benefits of process automation.
- Configure and utilize the Nintex Automation Cloud platform effectively.
- Design and build workflows using the Nintex workflow designer.
- Create and customize forms to streamline data collection and input.
- Employ various actions within workflows for branching, looping, and data manipulation.
- Deploy workflows efficiently for sharing and reuse.

Course Outline

Module 1: Introduction to Process Automation

- What is process automation?
- Understanding the benefits of process automation
- Overview of the Nintex Process Platform
- Characteristics and key components of automation

Module 2: Configure Nintex Automation Cloud

- Exploring the Automation Cloud platform
- Connecting SharePoint with the Nintex platform
- Understanding workflow concepts and terminology
- Configuring Automation Cloud settings and preferences
- Creating an account and accessing Nintex Automation Cloud

Module 3: Building Workflows in Nintex Cloud

- Know your Process
- Planning the workflow
- Exploring the workflow designer
- Building the workflow

Module 4: Using Forms and Start Events

- Start Events
- Connectivity
- Working with forms
- Designing forms using form features

Module 5: Using Actions in Workflow

- Branching Actions
- Looping and flow actions
- Collection operations

Module 6: Deploying Workflows

- Saving and publishing workflows and its importance

- Exporting and importing workflows for sharing and reuse

Module 7: Labs Exercises to be Covered

- Creating leave request using SP online list
- Creating an Employee onboarding solution
- Create an automated claims processing application