

SharePoint 2013 Power User and Introduction to Nintex Workflow and Nintex Forms

Duration: 4 Days (*Face-to-Face & Remote-Live*), or 28 Hours (*On-Demand*)

Price: CDN\$2,775 (*Face-to-Face & Remote-Live*), or CDN\$1,995 (*On-Demand*)

Discounts: We offer multiple discount options. [Click here](#) for more info.

Delivery Options: Attend face-to-face in the classroom, [remote-live](#) or [on-demand training](#).

Students Will Learn

- Creating and configuring SharePoint Web sites
- Adding lists and libraries to sites for information sharing and collaboration
- Creating and managing SharePoint pages and Web parts
- Creating and configuring SharePoint site content parameters
- Using views to customize SharePoint site browsing
- Managing user access to site collections, sites, lists and libraries
- Using workflows to automate business rules
- Configuring Microsoft Office document check-out and versioning
- Using Business Connectivity Services (BCS) to display database tables as SharePoint Web content
- Using corporate branding to personalize Nintex Forms
- Applying validation and formatting rules to add flexibility to Nintex Forms
- Configuring Nintex Workflow to integrate with SharePoint Lists and Libraries
- Using Nintex Workflow to implement common SharePoint workflow designs

Course Description

This hands-on course thoroughly covers out-of-the-box features of SharePoint and how to customize these features to make the most of your SharePoint environment. The course begins with an overview of SharePoint system architecture, then moves on to creating SharePoint Web sites. From there, students will deploy navigation solutions for users to easily locate data. Students learn how to create new sites from scratch, as well as from built-in templates. Web parts and pages are then added to sites to provide greater flexibility in the way SharePoint is presented to users.

Included are techniques for using lists to promote information sharing, creating surveys, managing tasks and projects, as well as sharing calendars. Document and file management

is also covered, including setting up content approval, managing major and minor file versions, and checking-out/checking-in documents.

Students will learn how to use built-in workflows, as well as how to display database records on SharePoint sites using Business Connectivity Services (BCS).

Comprehensive hands on exercises illustrate the concepts and techniques presented, and provide practice creating common SharePoint components.

During the last day of class, students are introduced to third-party *Nintex Workflow* and *Nintex Forms* software. Nintex's enhanced workflow functionality is explored, and students create workflow types not shown during the first three days of class. Students have the opportunity to edit previously designed workflows using Nintex's intuitive design canvas. Nintex's highly visual forms system is also covered. Students develop enhanced, company-branded dialog boxes and data input forms. These serve to replace SharePoint's built-in forms solutions. Students will also create list-based forms that include error checking and user input rules.

Students who are not interested in the Nintex Workflow and Nintex Forms portion of class should take the 3-day [Sharepoint 2013 Power User](#) course.

Course Prerequisites

Familiarity with Windows Server 2012 R2 or Windows desktop operating system environment (Windows 8.1 or later). Basic understanding of NTFS file & folder structure and network access.

Course Overview

SharePoint Sites

- Categories of SharePoint Sites
- Creating and Managing New Web Applications
- Creating and Managing Site Collections
- Creating Sites for Meetings
- Creating Sites to Support Teams
- Understanding and Using SharePoint Web Database
- Setting up Site Navigation Systems

Libraries and Document Management

- Allowing Users to Share Files and Documents with Libraries
- Configuring Content Approval of Library Entries
- Setting up Check-In/Check-Out to Enforce Exclusive Access to Documents
- Managing Major and Minor File Changes
- Saving Past Versions of Files
- Fully Customizing Libraries

Effectively Using Lists

- Using Lists for Information Sharing
- Creating Shared Calendars, Tasks, Announcements and Other Lists
- Creating Custom Lists From Scratch
- Creating New Lists Based on Templates
- Creating and Using Surveys
- Adding Custom Columns to Lists
- Creating Custom Views of Lists

Automating Business Rules with Workflows

- Using Built-in Workflows
- Creating Workflows Using Internet Explorer
- Creating Workflows Using SharePoint Designer 2013
- Configuring Workflows to Start Automatically
- Managing, Editing and/or Deleting Existing Workflows

- Creating Custom Views of Libraries
- Setting Validation Rules for New Library Entries

Pages and Web Parts

- Adding Pages to Sites
- Understanding SharePoint's Built-in Web Parts
- Adding Web Parts to Sites
- Customizing Web-Parts and Pages
- Creating Wiki Pages, Publishing Pages and Web-Part Pages
- Creating Site Navigation Systems

Microsoft Office Integration

- Understanding SharePoint's Integration With MS-Office
- Displaying Excel Content Using Web Parts
- Setting Up Shortcuts to SharePoint Libraries
- Using Document Sets to Manage Groups of Files

Nintex Forms and Nintex Workflow

- Using Label Controls to Replace SharePoint's Default Column Labels
- Using Data Controls to Make Text Boxes More Intuitive for Users
- Deploying Validation Rules to Prevent Invalid Data Entries
- Implementing Formatting Rules to Prevent Data-Entry Omissions
- Understanding "Sequential" vs. "State Machine" Workflows
- Using the Nintex Design Canvas to Create Intuitive, Easy-to-Document Workflows
- Configuring "Collection" and "Three-State" Workflow Types

Managing Site Appearance

- Adding and Removing SharePoint Site Features
- Using Themes to Customize Page Colors and Fonts
- Using Picture Files to Standardize Corporate Logos

Database Integration with Business Connectivity Services (BCS)

- Understanding Business Connectivity Services (BCS)
- Integrating External Data Content Using SharePoint Designer 2013
- Displaying SQL Records on SharePoint Sites
- Updating SQL Content Using SharePoint Lists in Internet Explorer
- Updating SQL Content Using SQL Server Management Studio (SSMS)

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