

Tips and Tricks from the Nintex Trenches

Nicole Prestby

SharePoint Saturday Atlanta – June 17, 2017



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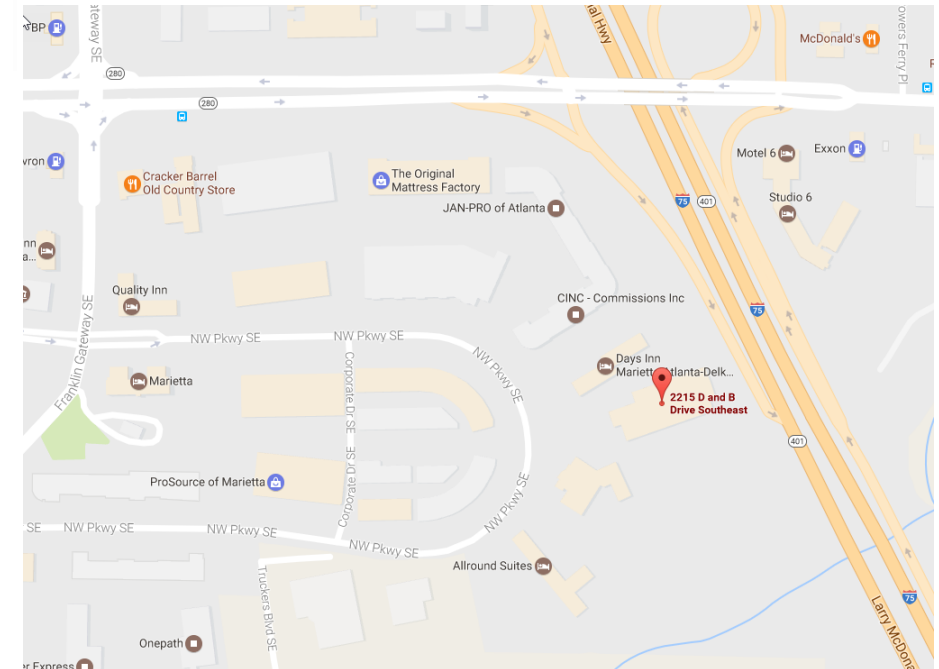
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 - Event Feedback
 - The Booth Game
- Tickets earned by providing feedback increase your odds of winning super duper awesome prizes!

About Me

- Senior SharePoint Consultant at Abel Solutions
- Nintex vTE (Virtual Technical Evangelist)
- Some Fun Stuff:
 - Technically Trained Artist
 - Graphic Design/Marketing Background
 - Worked as Photographer at WDW



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in nprestby



About Abel Solutions



Founded in 1994.



30 employees in
Alpharetta and Marietta, GA.



Subsidiary of Applied
Technical Services (ATS),
a \$105M engineering
consulting and inspection
services firm.



Focused on solving business
problems with Microsoft
technology.

Microsoft Partner
Gold Collaboration and Content

NINTEX Premier
PARTNER

Microsoft Gold Partner since
2000.
Nintex Partner since 2008.



Customers include many mid-
to upper-midmarket to
enterprise-sized companies.

- Nintex Overview
- Tips and Tricks
 - Nintex Workflow
 - Nintex Forms
- Resources



Knock, knock... Who's Here?



- Who currently has Nintex?

- Nintex On-prem?

- 2016?
- 2013?
- 2010?
- Older?



- Nintex for Office 365?



- Nintex Mobile?



- App Studio?

- Nintex Hawkeye?



- Nintex Doc Gen?



- Nintex Workflow Cloud?

Nintex Overview



Nintex Workflow Platform



Nintex Workflow



Nintex Forms



Nintex Mobile



Nintex Hawkeye



Nintex App Studio



Nintex Document Generation



Nintex Connectors

Tips and Tricks: Nintex Workflow



Getting Started

- Design and Runtime

- Nintex Workflow for SharePoint 2010

- Supported: IE7.x; Recommended: **IE8 and above**

- Nintex Workflow for SharePoint 2013

- Supported: IE8.x; Recommended: **IE9 and above**

- Nintex Workflow for SharePoint 2016

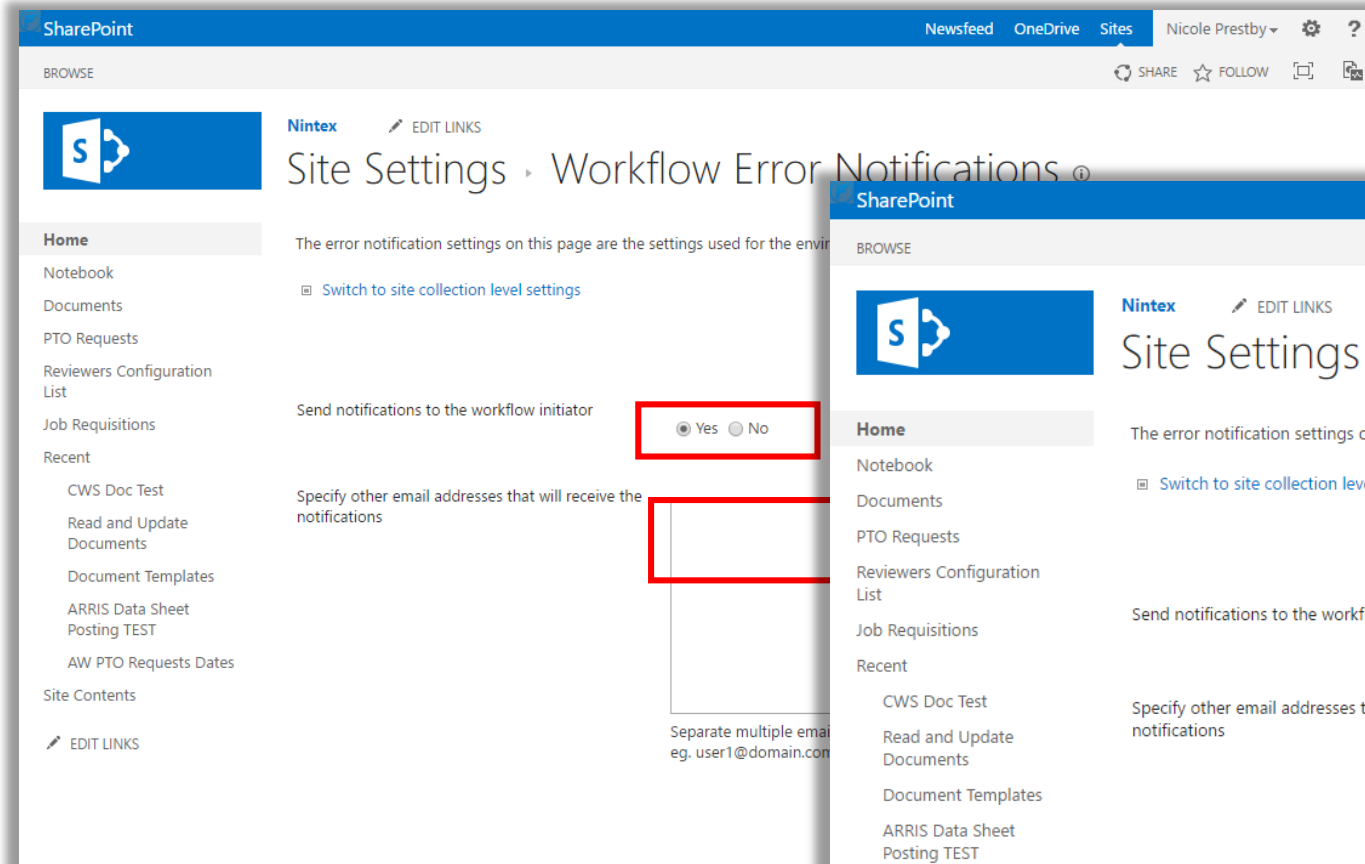
- Supported: **IE10, IE11**, latest versions of **Firefox, Chrome, Safari, Edge**

- Nintex Workflow for Office 365

- Supported: IE9 and above, latest versions of Firefox, Chrome
 - Recommended: **IE10 and above**

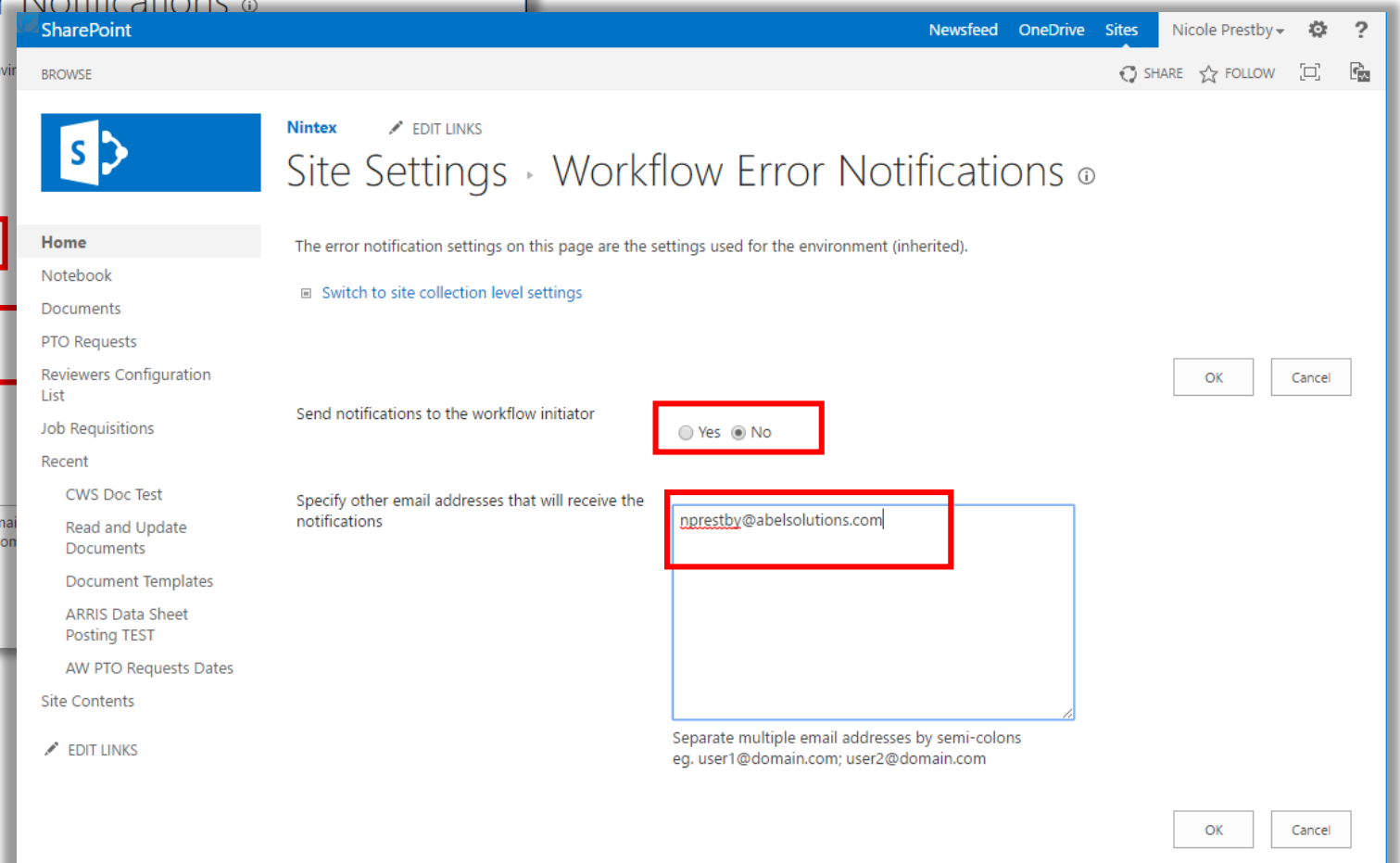
Source: <https://community.nintex.com/docs/DOC-1511>

Error Notifications



Default: Initiator only

Update to Initiator = No; Add yourself



Workflow Inventory

Nintex

EDIT LINKS

Site Settings ▸ Site Workflow Inventory ⓘ

[Modify view](#) [Export table to CSV](#) [View statistics](#) [View workflows for entire site collection](#)

List Name ▼ ↑	Workflow Name	Workflow Type	Modified By	Modified	Published Version	Last Saved Version	Last Run Time	Delete
Active Documents	Copy Document Workflow	List workflow	<input type="checkbox"/> Nicole Prestby	6/26/2014 3:40:41 PM	2.0	2.0		✕
Active Documents	Document Control Workflow	List workflow	<input type="checkbox"/> Nicole Prestby	6/26/2014 3:42:24 PM	12.0	12.0	6/26/2014 3:27:16 PM	✕
Documents	TEST Update MMD Multiple Values	List workflow	<input type="checkbox"/> Nicole Prestby	11/18/2016 8:31:28 AM	6.0	6.0	11/18/2016 8:31:52 AM	✕
Job Requisitions	Job Requisition Process Workflow	List workflow	<input type="checkbox"/> Rob Aycock	11/12/2015 4:39:12 PM	22.0	22.0	4/4/2017 10:06:11 AM	✕
PTO Requests	Basic PTO Request Workflow	List workflow	<input type="checkbox"/> Nicole Prestby	3/24/2014 12:30:48 PM		0.2		✕
PTO Requests	Copy Item Testing	List workflow	<input type="checkbox"/> Nicole Prestby	12/29/2014 1:54:37 PM	3.0	3.0		✕
PTO Requests	Create ics file for email attachment	List workflow	<input type="checkbox"/> Nicole Prestby	5/28/2015 3:09:16 PM	1.0	1.0		✕
PTO Requests	GP Test	List workflow	<input type="checkbox"/> Nicole Prestby	6/23/2016 12:18:13 PM	1.0	1.0	6/23/2016 12:20:05 PM	✕
PTO Requests	Hello World Test	List workflow	<input type="checkbox"/> Nicole Prestby	9/12/2014 9:21:14 AM	1.0	1.0		✕
PTO Requests	New WF TEST	List workflow	<input type="checkbox"/> Nicole Prestby	8/8/2016 2:30:35 PM		0.1		✕
PTO Requests	Onboarding external users	List workflow	<input type="checkbox"/> Nicole Prestby	6/12/2014 9:27:56 AM		0.2		✕
PTO Requests	Test assigning task to AD group	List workflow	<input type="checkbox"/> Nicole Prestby	2/11/2015 10:42:58 AM	2.0	2.0	2/11/2015 10:43:46 AM	✕
PTO Requests	Test creating when multiple Doc Set CTs on one list	List workflow	<input type="checkbox"/> Nicole Prestby	2/16/2015 5:25:18 PM	2.0	2.0		✕
PTO Requests	Test Flexi Task	List workflow	<input type="checkbox"/> Nicole Prestby	6/16/2016 2:36:51 PM	1.0	1.0	5/31/2017 12:42:44 PM	✕
PTO Requests	Test WF	List workflow	<input type="checkbox"/> Nicole Prestby	6/24/2016 9:41:50 AM	5.0	5.0	6/24/2016 9:42:07 AM	✕
PTO Requests	Testing Business Day Due Date	List workflow	<input type="checkbox"/> Nicole Prestby	3/24/2016 3:49:25 PM	1.0	1.0	3/24/2016 3:51:10 PM	✕
PTO Requests	Testing Convert list view to PDF	List workflow	<input type="checkbox"/> Nicole Prestby	5/14/2014 4:43:36 PM	1.0	1.0		✕
PTO Requests	Testing looping with yn variable	List workflow	<input type="checkbox"/> Nicole Prestby	2/19/2016 11:41:02 AM	2.0	2.0	2/19/2016 11:41:36 AM	✕
PTO Requests	Testing Task Claiming with Nintex	List workflow	<input type="checkbox"/> Nicole Prestby	3/10/2015 10:44:41 AM	1.0	1.0	3/10/2015 10:45:34 AM	✕
PTO Requests	Create new CT for Charleston Testing	List workflow	<input type="checkbox"/> Nicole Prestby	3/29/2017 3:59:48 PM	1.0	1.0		✕
PTO Requests	TEST Custom WF Status	List workflow	<input type="checkbox"/> Nicole Prestby	4/13/2017 1:01:08 PM	2.0	2.0	4/13/2017 1:01:52 PM	✕
PTO Requests	TEST Auto Start Same WF	List workflow	<input type="checkbox"/> Nicole Prestby	5/31/2017 12:38:14 PM	4.0	4.0	5/31/2017 12:44:07 PM	✕
Read and Update Documents	Read and Update Current Doc	List workflow	<input type="checkbox"/> Nicole Prestby	12/21/2016 10:15:57 AM	1.0	1.0	12/21/2016 11:42:42 AM	✕

Testing and Troubleshooting

Manual Start for Unit Testing

Workflow Settings

WORKFLOW SETTINGS

Save Cancel Variables Association Columns Edit Start Form Manage Start Variable Order Help

Commit Settings Help

Title and description

Title * Job Requisition Process Workflow

Description

Workflow options

Start manually ☒

Require manage list rights ☐

Start when items are created No

Start when items are modified No

Publish without validation ☐

Enable workflow to start from the item menu ☒

Menu item label Job Requisition Process Workflow

Menu item position 0

SharePoint

BROWSE ITEMS LIST

Job Requisitions

Nintex Demo EDIT LINKS

Home

TRAVEL REQUEST

Travel Request Form

Department

Cost Center

PURCHASE ORDERS

Purchase Orders Form

Products

NINTEX FORMS RULES AND VALIDATION DEMO

JOB REQUISITIONS

Job Requisitions

+ new item or edit this list

All Items Find an item

ID	Title	Department	Position Description
35	Marketing Manager	Marketing	Responsible for developing, im
36	Accounts Payable Clerk		
47	Help Desk		
54	Senior Project Manager		
55	Help Desk		

Job Requisition Process Workflow

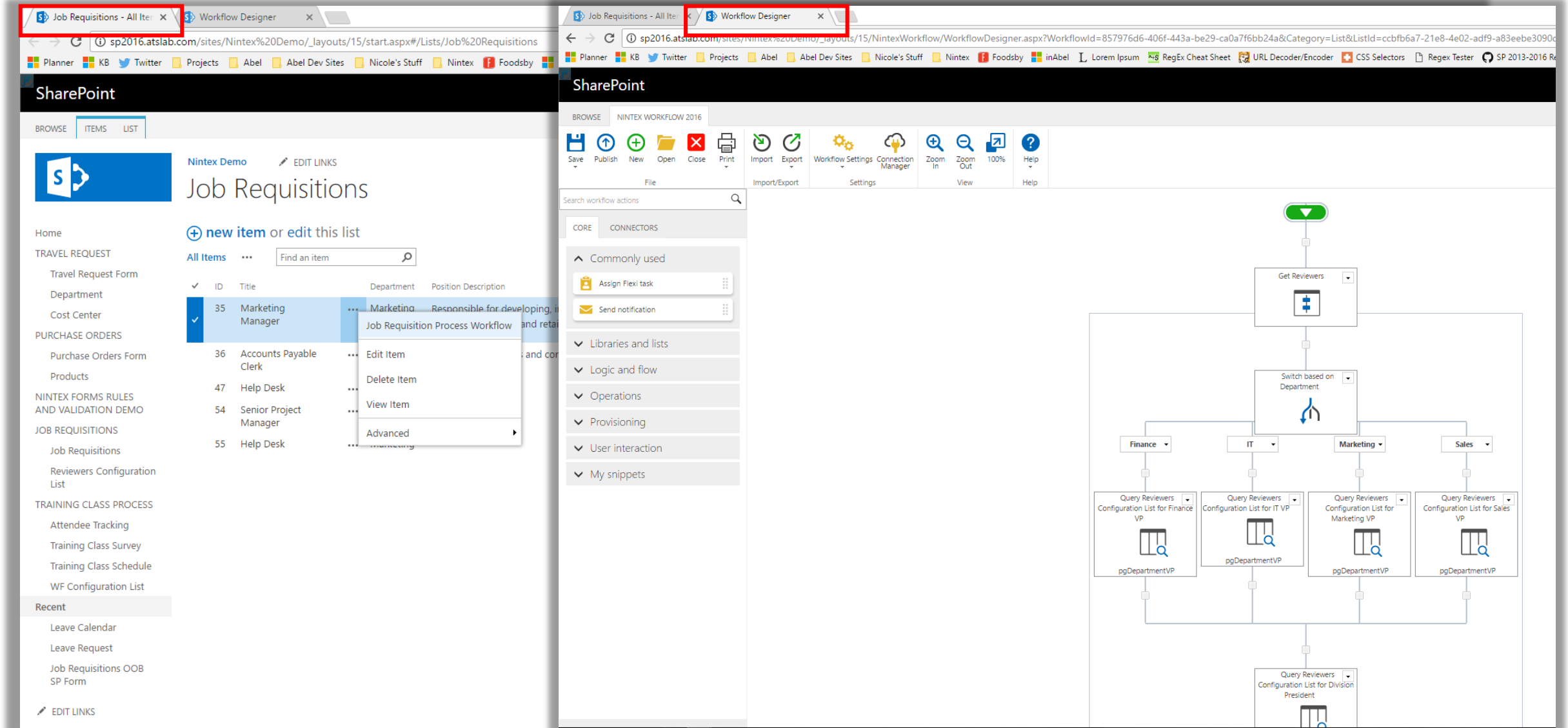
Edit Item

Delete Item

View Item

Advanced

Separate Browser Tabs for Testing



The image displays two browser tabs side-by-side, illustrating the process of testing separate components of a SharePoint application.

Left Tab: Job Requisitions - All Items

The left tab shows the SharePoint "Job Requisitions" list. The "ITEMS" tab is selected in the top navigation bar. The list displays the following items:

ID	Title	Department	Position Description
35	Marketing Manager	Marketing	Responsible for developing, implementing, and retaining the Job Requisition Process Workflow
36	Accounts Payable Clerk		
47	Help Desk		
54	Senior Project Manager		
55	Help Desk		

A context menu is open for the "Marketing Manager" item, showing options: "Edit Item", "Delete Item", "View Item", and "Advanced".

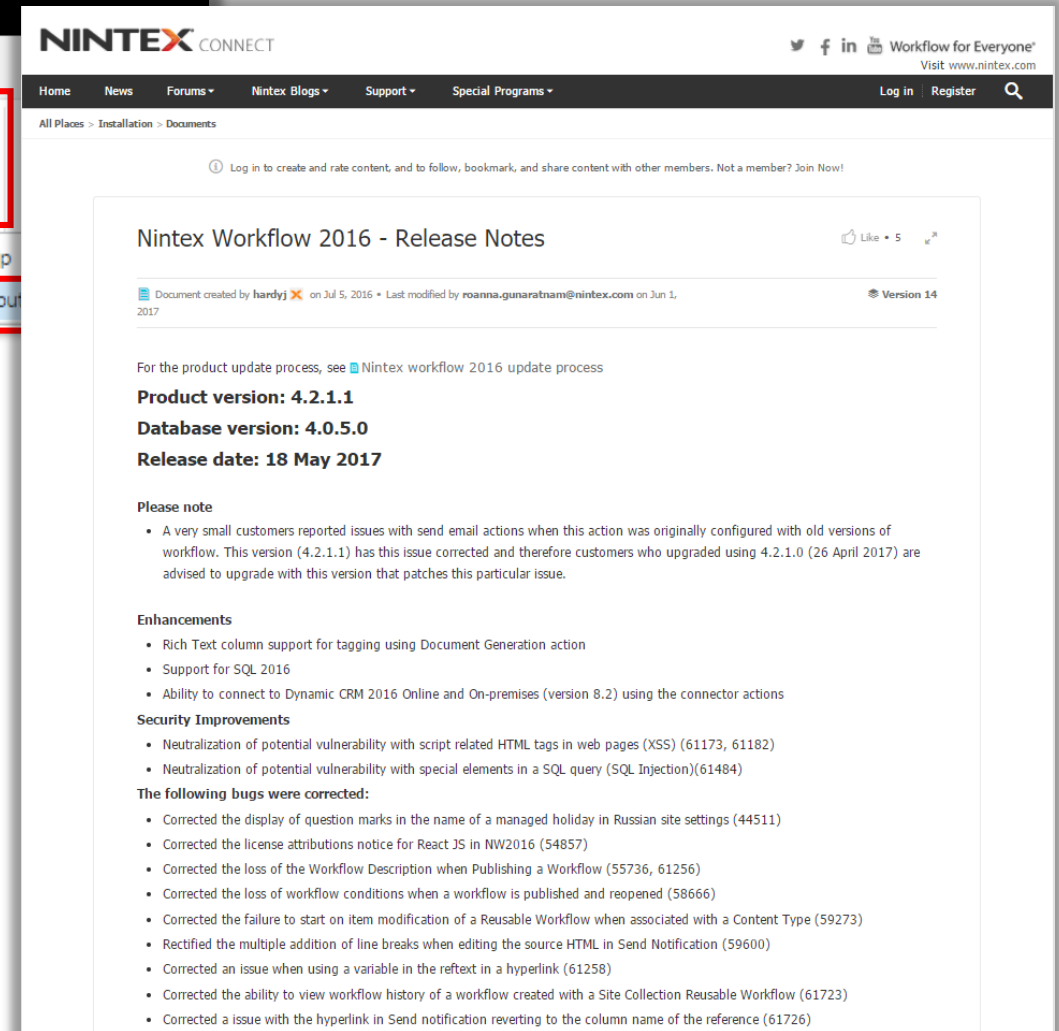
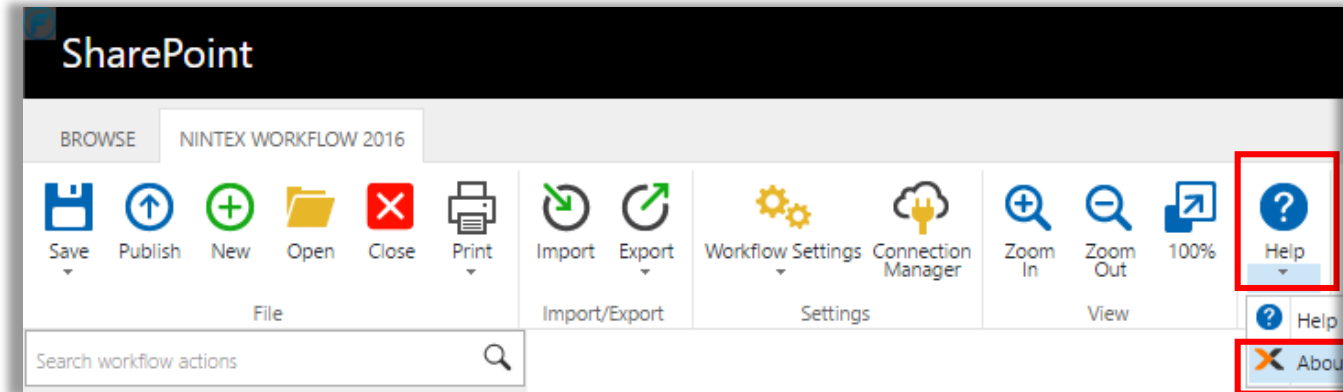
Right Tab: Workflow Designer

The right tab shows the Nintex Workflow Designer interface. The "Workflow Designer" tab is selected in the top navigation bar. The workflow is titled "Job Requisition Process Workflow".

The workflow diagram shows the following steps:

- Start (Green circle)
- Get Reviewers (Task)
- Switch based on Department (Decision)
- Four parallel paths based on Department: Finance, IT, Marketing, and Sales.
- Each path leads to a "Query Reviewers" task, which is configured to query a specific list (e.g., "Configuration List for Finance VP", "Configuration List for IT VP", etc.).
- All paths converge and lead to a final "Query Reviewers" task for the "Division President".

About Nintex Workflow

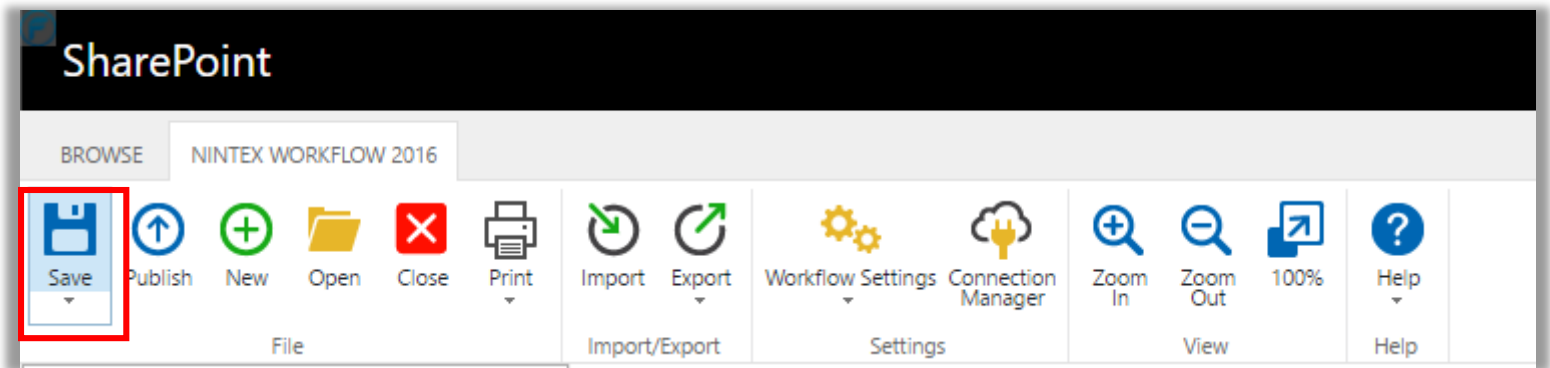


Development Best Practices

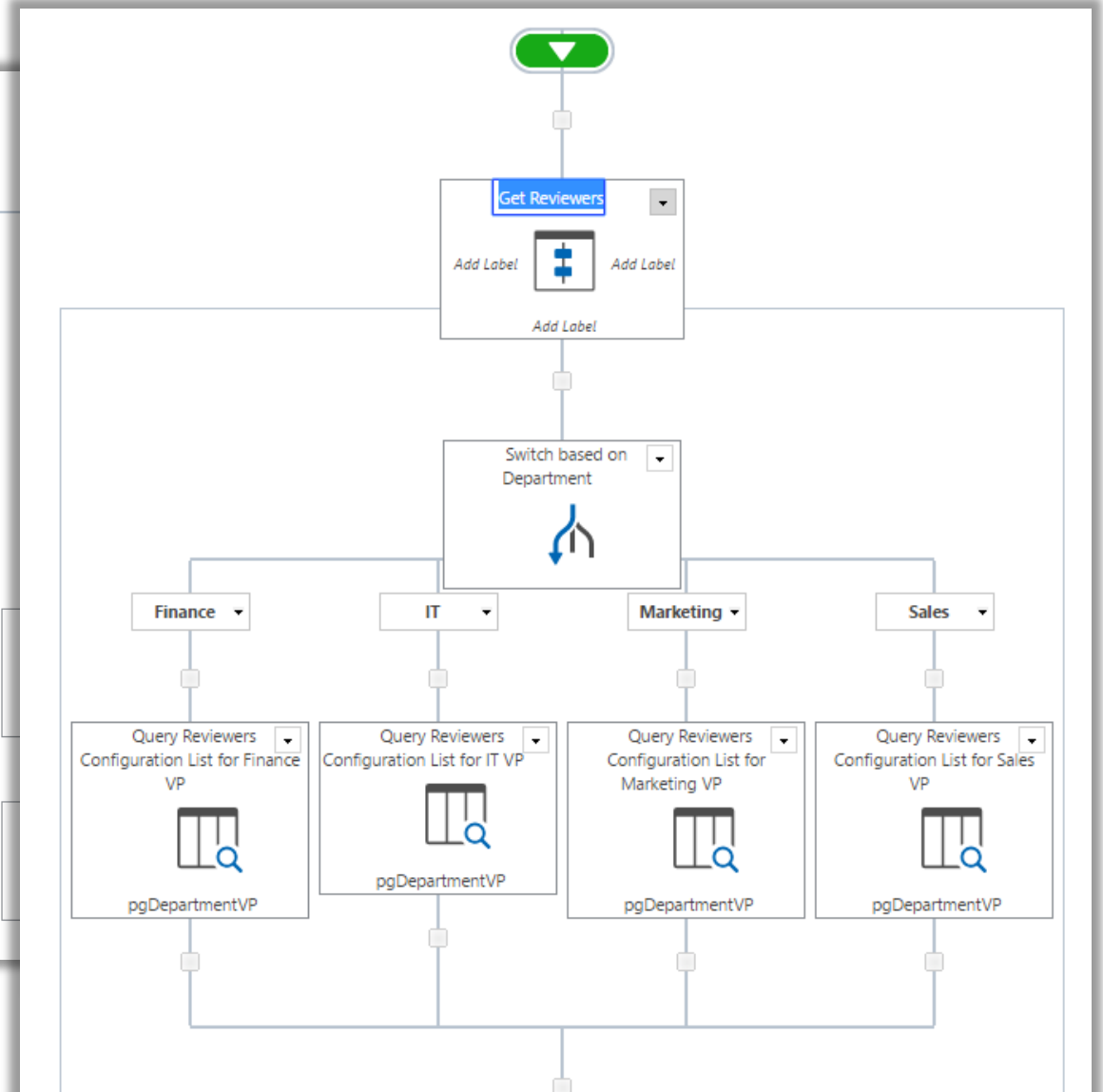
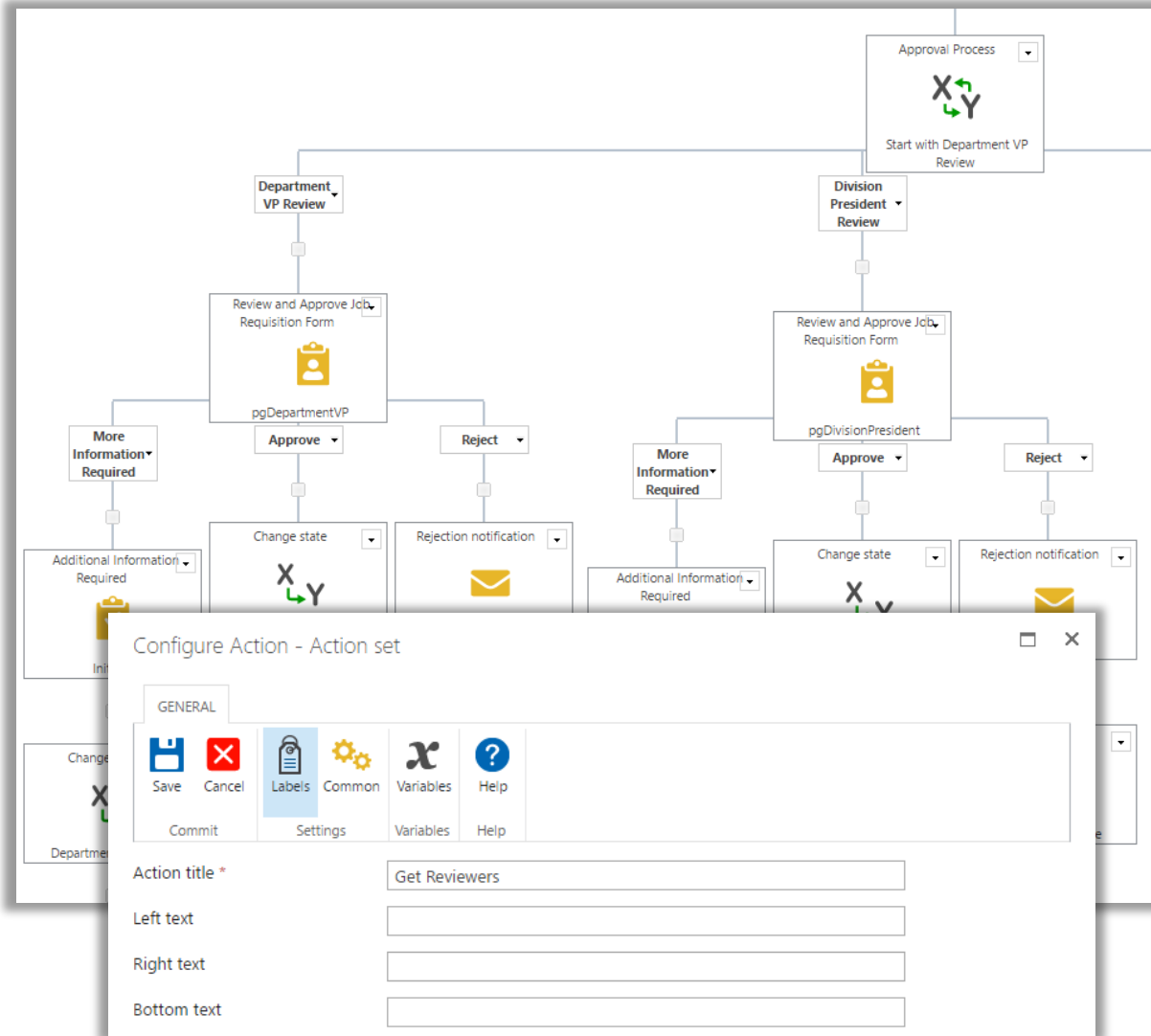
- Have a consistent naming convention, such as:
 - Choice – chDepartment
 - Number – numOrderNumber
 - Date and Time – dtDueDate
 - Yes/No – ynErrorOccured
 - Person or Group – pgAssignedTo
 - Integer – intNumberOfItems
 - List Item ID or Action ID – idCurrentItemID
 - Collection – collItemsAssignedToCurrentUser

Save Early, Save Often!

- Saves your progress, not live to users
- No automatic save
- No "Undo"
- Browser crashes happen; internet goes down



Label Your Actions



Versions and Change Comments

Set Title & Description

SET WORKFLOW NAME

Submit

Cancel

Help

Commit

Help

Title *

Job Requisition Process Workflow

☒ Overwrite existing version

Description

Open Workflow

OPEN WORKFLOW

Select

Cancel

Help

Actions

Help

Title	Modified By	Modified	Published
- Job Requisition Process Workflow	Nicole Prestby	6/5/2017 6:02 PM	6/5/2017 6:02 PM
Version	Created by	Created	
3.0 (current)	Nicole Prestby	6/5/2017 6:02 PM	
2.0	Nicole Prestby	5/31/2017 2:38 PM	
1.0	Billy Riley	12/16/2016 10:56 AM	

☐ Show published versions only

☐ Show template page when creating a new workflow

Change comments

Configured reminder notification to Level 1 Approver.

BROWSE

NINTEX WORKFLOW 2016

Save

Publish

New

Open

Close

Print

Import

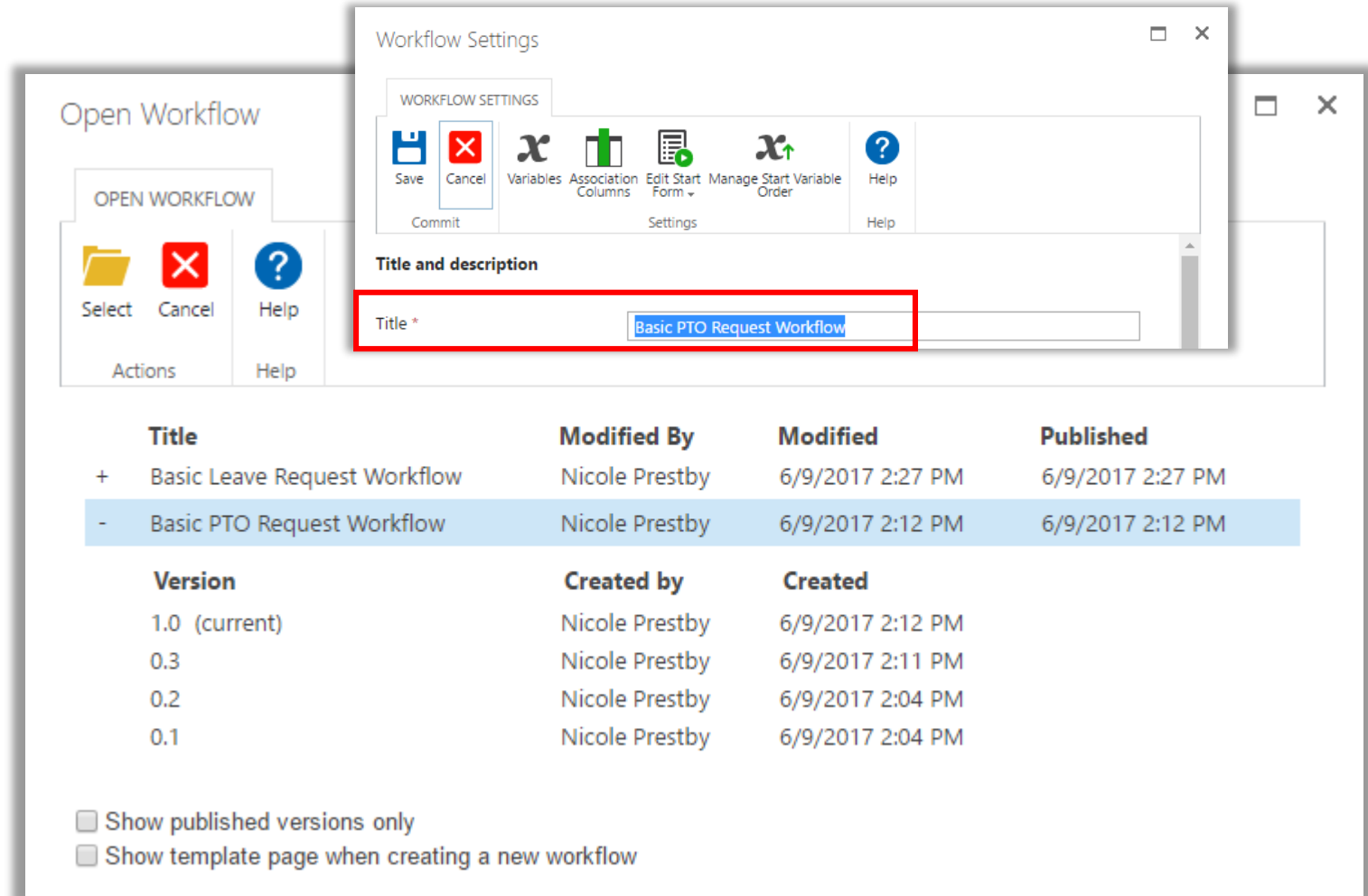
Export

File

Import/Export

Create a Copy of Your Workflow

- Changing the WF Title will create a new version of the WF
- "Save As"
- Can be good and bad, depending on what you are trying to do



The screenshot shows the 'Open Workflow' dialog box. The 'Workflow Settings' sub-dialog is open, showing the 'Title and description' section. The 'Title' field is highlighted with a red box and contains the text 'Basic PTO Request Workflow'. Below the dialog, a table lists the workflow versions.

	Title	Modified By	Modified	Published
+	Basic Leave Request Workflow	Nicole Prestby	6/9/2017 2:27 PM	6/9/2017 2:27 PM
-	Basic PTO Request Workflow	Nicole Prestby	6/9/2017 2:12 PM	6/9/2017 2:12 PM

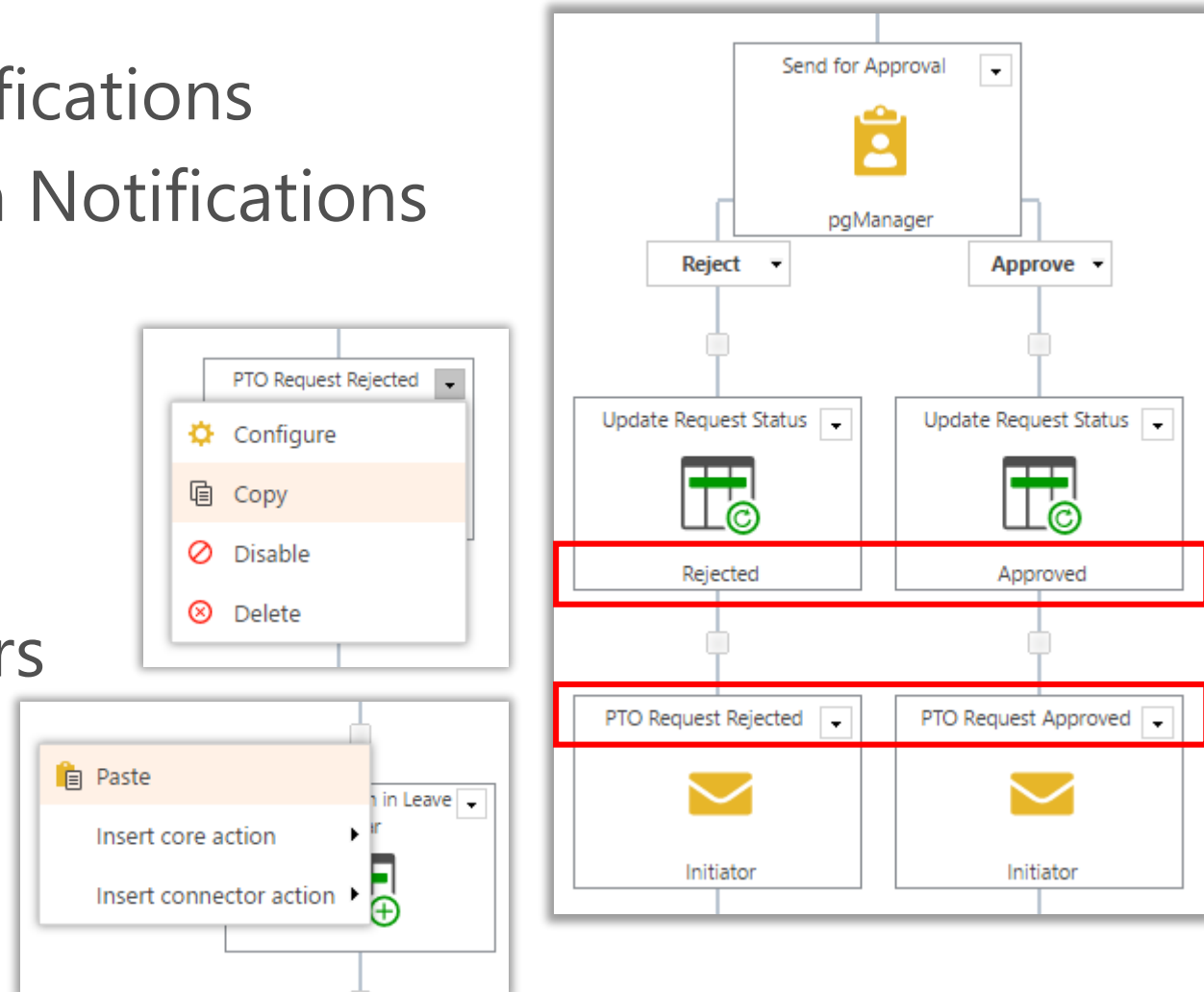
Version	Created by	Created
1.0 (current)	Nicole Prestby	6/9/2017 2:12 PM
0.3	Nicole Prestby	6/9/2017 2:11 PM
0.2	Nicole Prestby	6/9/2017 2:04 PM
0.1	Nicole Prestby	6/9/2017 2:04 PM

☐ Show published versions only
☐ Show template page when creating a new workflow

Work Smarter, Not Harder

Copy/Paste Configured Actions

- Emails
 - Approval/Rejection Notifications
 - Submission/Cancellation Notifications
- Set Field Values
 - Update Status
- Query list
 - Different filter parameters



Copy/Paste HTML

Configure Action - Assign Flexi task

GENERAL

FORMAT TEXT

INSERT

Arial 13px

B *I* U x_2 x^2

Font

Paragraph

Heading 1

Paragraph

ABC

Spelling

<>
Edit Source

Select

Convert to XHTML

Markup

From

Importance

Normal

Rich Text

A task has been assigned to you regarding this item:
[Context Item Display Name](#)
Title: [Title](#)
Position Description: [Position Description](#)
To be Filled By: [To be Filled By](#)
Department: [Department](#)
Hiring Supervisor: [Hiring Supervisor](#)
Click [here](#) to respond to the task.
Click [here](#) to view the workflow status.

HTML Source

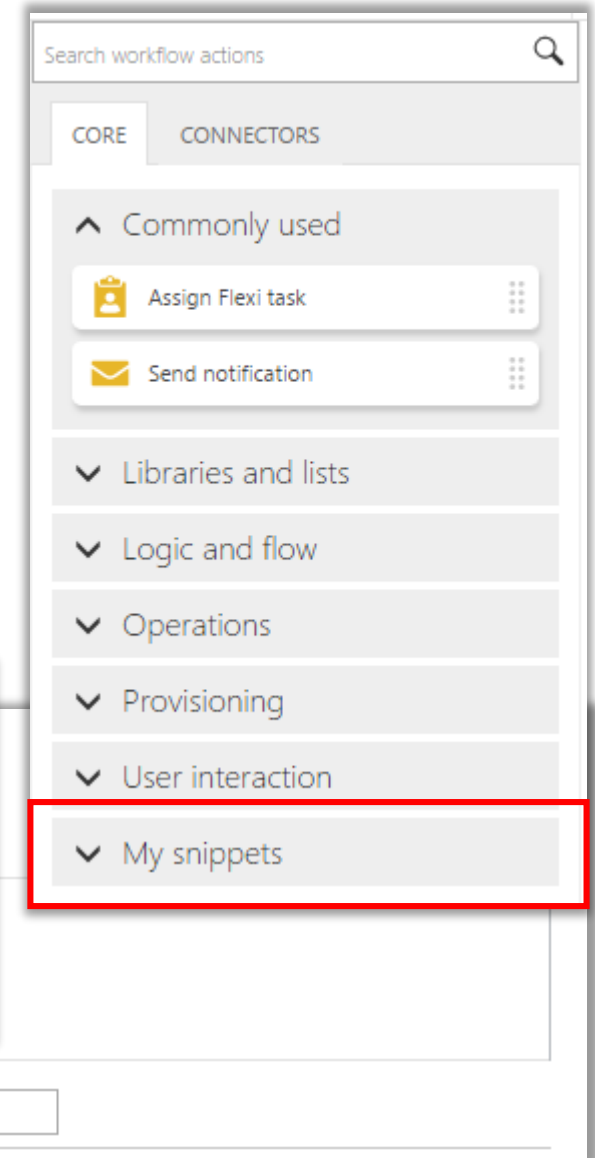
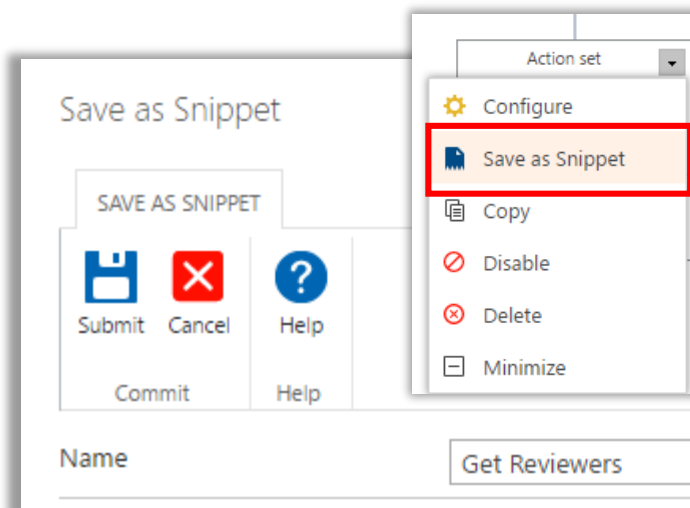
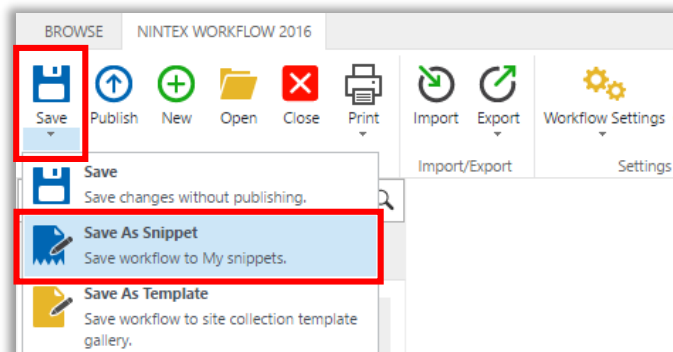
```
<font face="arial" size="2">
<p>
  <span id="NWRTReference1"></span>A task has been assigned to you regarding this item:</p>
<p>
  <span><span id="NWRTReference_A"><a class="ms-rtestate-write" onclick="selectThis(this);" contenteditable="false" href="javascript:void(0);"
link="true" refext="%7BCommon%3AContextItemDisplayName%7D" reflink="{Common:ContextItemUrl}" style="text-decoration: underline; color: blue;">Context
Item Display Name</a></span></span></p>
  <blockquote dir="ltr" style="margin-right: 0px;">
    <p>
      <span><span><strong>Title:</strong>
        <span id="NWRTReference2">
          <a class="ms-rtestate-write" onclick="selectThis(this);" contenteditable="false" href="javascript:void(0);" link="false"
refext="%7BItemProperty%3ATitle%7D" style="text-decoration: underline; color: red;">Title</a></span><br><strong>Position Description:</strong>
          <span id="NWRTReference3">
            <a class="ms-rtestate-write" onclick="selectThis(this);" contenteditable="false" href="javascript:void(0);" link="false"
refext="%7BItemProperty%3APositionDescription%7D" style="text-decoration: underline; color: red;">Position Description</a></span><br><strong>To be
Filled By:</strong>
            <span id="NWRTReference4">
              <a class="ms-rtestate-write" onclick="selectThis(this);" contenteditable="false" href="javascript:void(0);" link="false"
refext="%7BItemProperty%3AToBeFilledBy%7D" style="text-decoration: underline; color: red;">To be Filled By</a></span></span></span></p>
      <span><span><strong>Department:</strong>
        <span id="NWRTReference5">
          <a class="ms-rtestate-write" onclick="selectThis(this);" contenteditable="false" href="javascript:void(0);" link="false"
refext="%7BItemProperty%3ADepartment%7D" style="text-decoration: underline; color: red;">Department</a></span><br><strong>Hiring Supervisor:
          <span id="NWRTReference6">
            <a class="ms-rtestate-write" onclick="selectThis(this);" contenteditable="false" href="javascript:void(0);" link="false"
refext="%7BItemProperty%3AHiringSupervisor%7D" style="text-decoration: underline; color: red;">Hiring Supervisor</a></span></span></span></p>
    </blockquote>
    <n>Click
  </p>
</font>
```

OK

Cancel

Snippets for Reuse

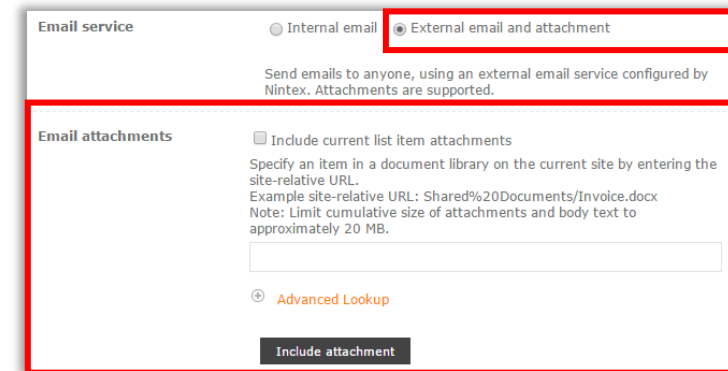
- Quickly reuse and add pre-configured groups of actions
- Save entire workflow as a snippet
- Save portions of workflow (Action set)
- Available throughout the site collection
- "My Snippets"



Office 365

Missing Features and Key Limitations

- Site Settings – WF Inventory, WF Constants, UDAs
- Site Workflow Scheduling
 - Workarounds: Plumsail, Schedule manager list/WF
- Visual WF History – so log more
 - Note: the more you log, MS may throttle
- Task Limitations
 - Can include attachments on email, but not task notification
 - Note: Requires you to use Nintex's external email service
 - Cannot suppress notification email
 - Not security trimmed and no delegation – anyone can complete
 - Tip: Capture Modified By to see who completed task (default: WF History shows Assigned To only)



The screenshot shows the 'Email service' configuration interface. At the top, there are two radio buttons: 'Internal email' and 'External email and attachment'. The 'External email and attachment' option is selected and highlighted with a red box. Below this, a text box states: 'Send emails to anyone, using an external email service configured by Nintex. Attachments are supported.' Under the 'Email attachments' section, there is a checkbox labeled 'Include current list item attachments' which is checked. Below the checkbox, there is a text box for specifying a site-relative URL, with an example: 'Shared%20Documents/Invoice.docx'. A note below the text box states: 'Note: Limit cumulative size of attachments and body text to approximately 20 MB.' At the bottom of the section, there is a link for 'Advanced Lookup' and a button labeled 'Include attachment'.

- Manually set Workflow Status
- Send emails to external users – Nintex email service
- Create service account for action configuration
 - Set password to never expire
- Use Nintex Forms for task forms
 - Nicer appearance, more control, you get it anyway!
- Request Data workaround
 - Nintex task form, capture data from user to workflow variable

Tips and Tricks: Nintex Forms

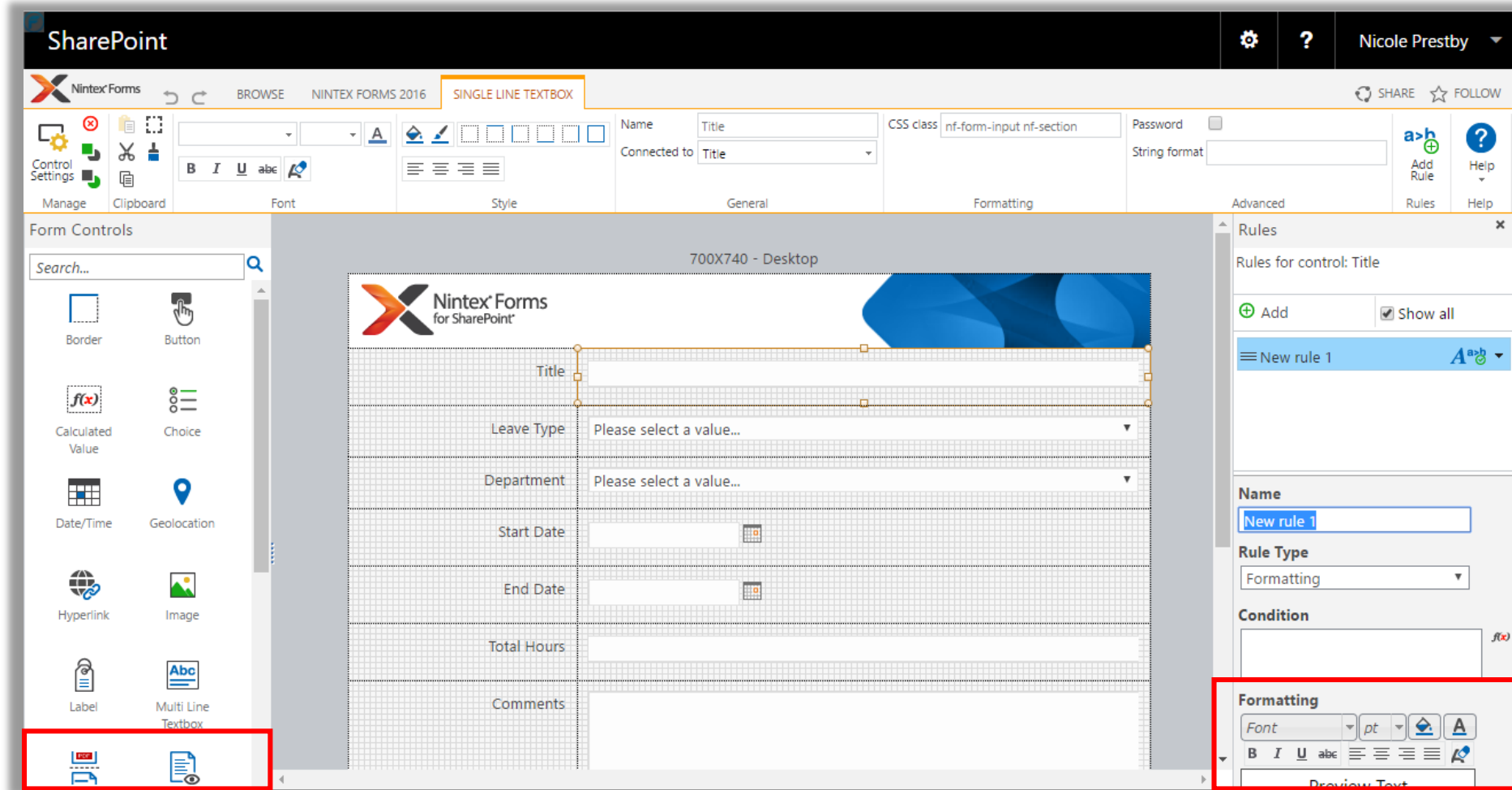


- Design
 - Nintex Forms for SharePoint 2010
 - Recommended: **IE10 and above**
 - Nintex Forms for SharePoint 2013
 - Recommended: **IE10 and above**
 - Nintex Forms for SharePoint 2016
 - Recommended: **IE10 and above**
 - Nintex Forms for Office 365
 - Supported: IE10 and above, latest versions of FireFox, Chrome
 - Recommended: **IE10 and above**

Source: <https://community.nintex.com/docs/DOC-1018>

- Runtime
 - Nintex Forms for SharePoint 2010
 - Supported: **IE7 and above** 32 bit, latest versions of **FireFox, Chrome**
 - Supported with limitations: IE7 and above 64 biit, Safari
 - Nintex Forms for SharePoint 2013
 - Supported: **IE8 and above**, latest versions of **Firefox, Chrome, Safari, Edge**
 - Nintex Forms for SharePoint 2016
 - Supported: **IE8 and above**, latest versions of **Firefox, Chrome, Safari, Edge**
 - Nintex Forms for Office 365
 - **IE9 and above**, latest versions of **Firefox, Chrome, Safari**

Bug When Opening Forms Designer



No Categories

Rules pane cut off

Hide the Grid

Settings - Form

GENERAL

Save Cancel Help

Commit Help

Grid cell height (pixels) 5

Grid cell width (pixels) 5

Canvas height (pixels) 740

Canvas width (pixels) 700

Snap to grid Yes

Show grid lines No

Start Date

End Date

Total Hours

Comments

Request Status Please select a value...

Cancel Request ☐

Attachments C:\Users\User\Documents\Recommendations.docx [Delete](#)
C:\Users\User\Documents\Estimates.xlsx [Delete](#)

Nintex Forms
for SharePoint

Title

Leave Type Please select a value...

Department Please select a value...

Start Date

End Date

Total Hours

Comments

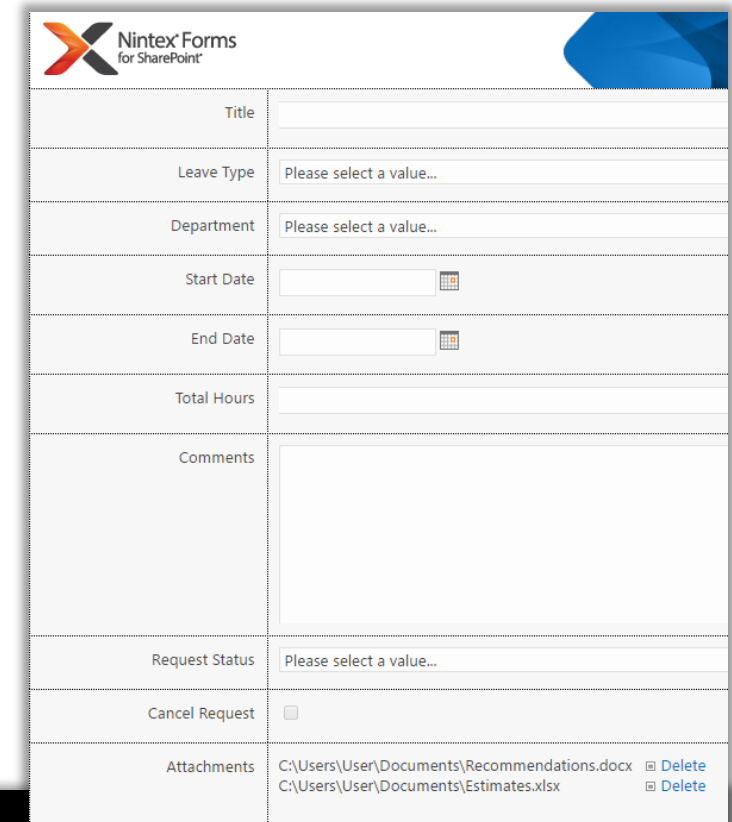
Request Status Please select a value...

Cancel Request ☐

Attachments C:\Users\User\Documents\Recommendations.docx [Delete](#)
C:\Users\User\Documents\Estimates.xlsx [Delete](#)

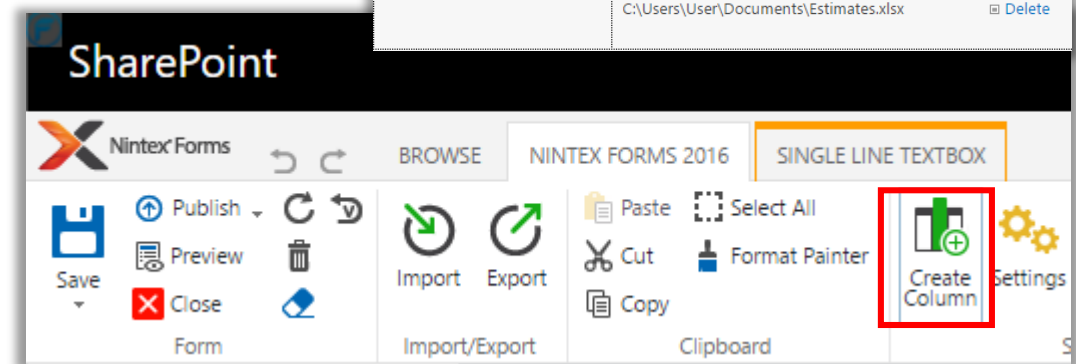
Creating Your Form

- Form controls connected to list columns – accessible via WF
- Create list and all columns 1st, then generate Nintex Form
 - All labels and input controls will be added for all defined list columns
- Can create list columns on-the-fly later
 - Add control and label separately



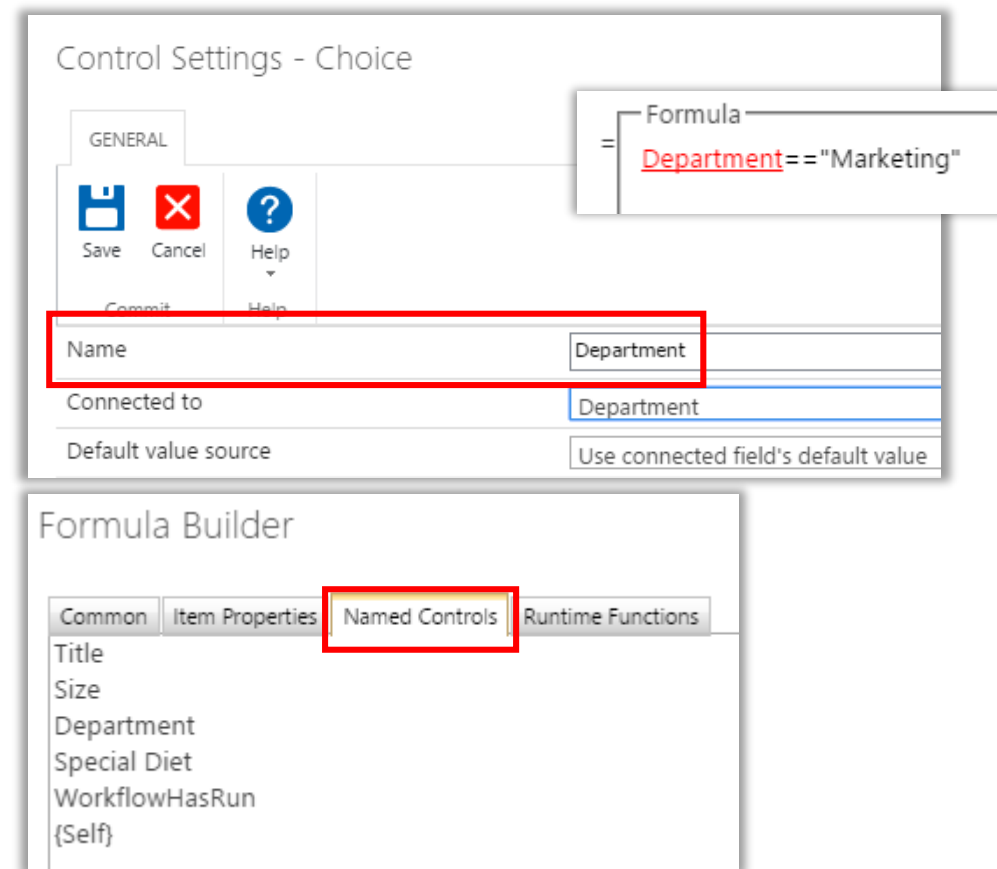
Nintex Forms for SharePoint

Title	<input type="text"/>
Leave Type	Please select a value...
Department	Please select a value...
Start Date	<input type="text"/>
End Date	<input type="text"/>
Total Hours	<input type="text"/>
Comments	<div></div>
Request Status	Please select a value...
Cancel Request	<input type="checkbox"/>
Attachments	C:\Users\User\Documents\Recommendations.docx Delete C:\Users\User\Documents\Estimates.xlsx Delete



Use Named Controls for Rules

- **Item Property** = value when form opens
- **Named Control** = real-time value as user completes the form
- Ex: Show and/or require additional fields if Department = Marketing
- Most controls can be named via "Name" property



The image displays two screenshots from a software interface. The top screenshot, titled "Control Settings - Choice", shows a "GENERAL" tab with a "Formula" field containing the expression `Department == "Marketing"`. Below this, the "Name" property is set to "Department", and the "Connected to" field is also set to "Department". The bottom screenshot, titled "Formula Builder", shows the "Named Controls" tab selected, with a list of available controls including "Title", "Size", "Department", "Special Diet", "WorkflowHasRun", and "{Self}".

Control Settings - Choice

Formula
`Department == "Marketing"`

Save Cancel Help

Name Department

Connected to Department

Default value source Use connected field's default value

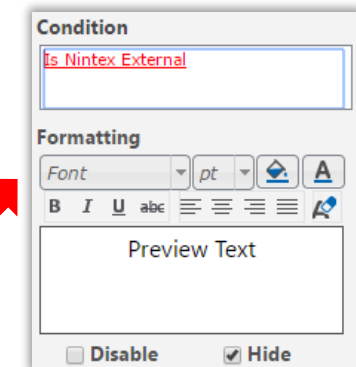
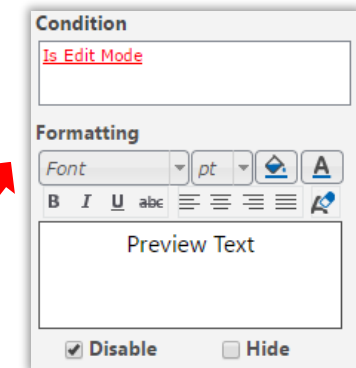
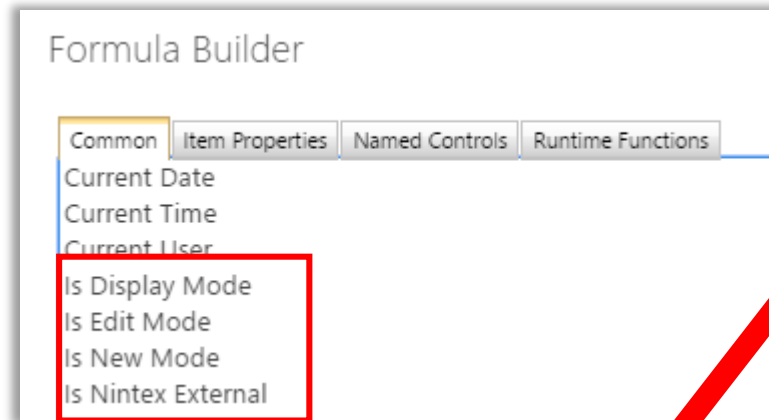
Formula Builder

Common Item Properties **Named Controls** Runtime Functions

Title
Size
Department
Special Diet
WorkflowHasRun
{Self}

Form Modes for Rules

- Create different “views” of the form
- Create rule > Formula Builder > Common
 - Is Display Mode
 - Is Edit Mode
 - Is New Mode
 - Is Nintex External
- Example Use Cases:
 - Enable controls on New, Disable on Edit
 - Hide controls for external (anonymous), show for internal



Form Modes for Rules

External User View – New



Abel Solutions Nintex Training Registration **NINTEX** Premier PARTNER

Please enter the following information to register for the upcoming Nintex Training Class for SharePoint on-premises on Tuesday, June 27 through Thursday, June 29, 2017.

Name * **Company ***

E-mail * **Phone Number ***

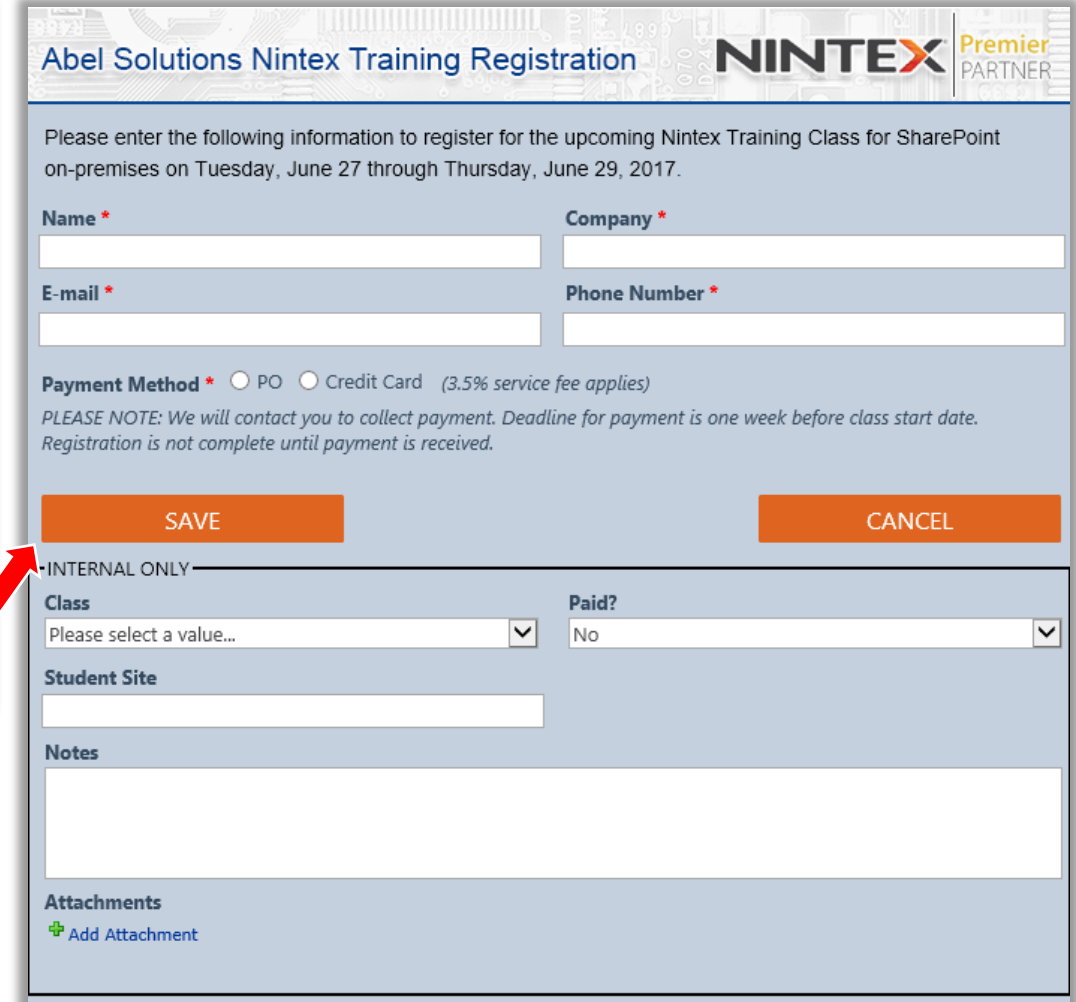
Payment Method * ☐ PO ☐ Credit Card (3.5% service fee applies)

PLEASE NOTE: We will contact you to collect payment. Deadline for payment is one week before class start date. Registration is not complete until payment is received.

REGISTER **CANCEL**

"Register" button

Internal User View – New



Abel Solutions Nintex Training Registration **NINTEX** Premier PARTNER

Please enter the following information to register for the upcoming Nintex Training Class for SharePoint on-premises on Tuesday, June 27 through Thursday, June 29, 2017.

Name * **Company ***

E-mail * **Phone Number ***

Payment Method * ☐ PO ☐ Credit Card (3.5% service fee applies)

PLEASE NOTE: We will contact you to collect payment. Deadline for payment is one week before class start date. Registration is not complete until payment is received.

SAVE **CANCEL**

INTERNAL ONLY

Class **Paid?**

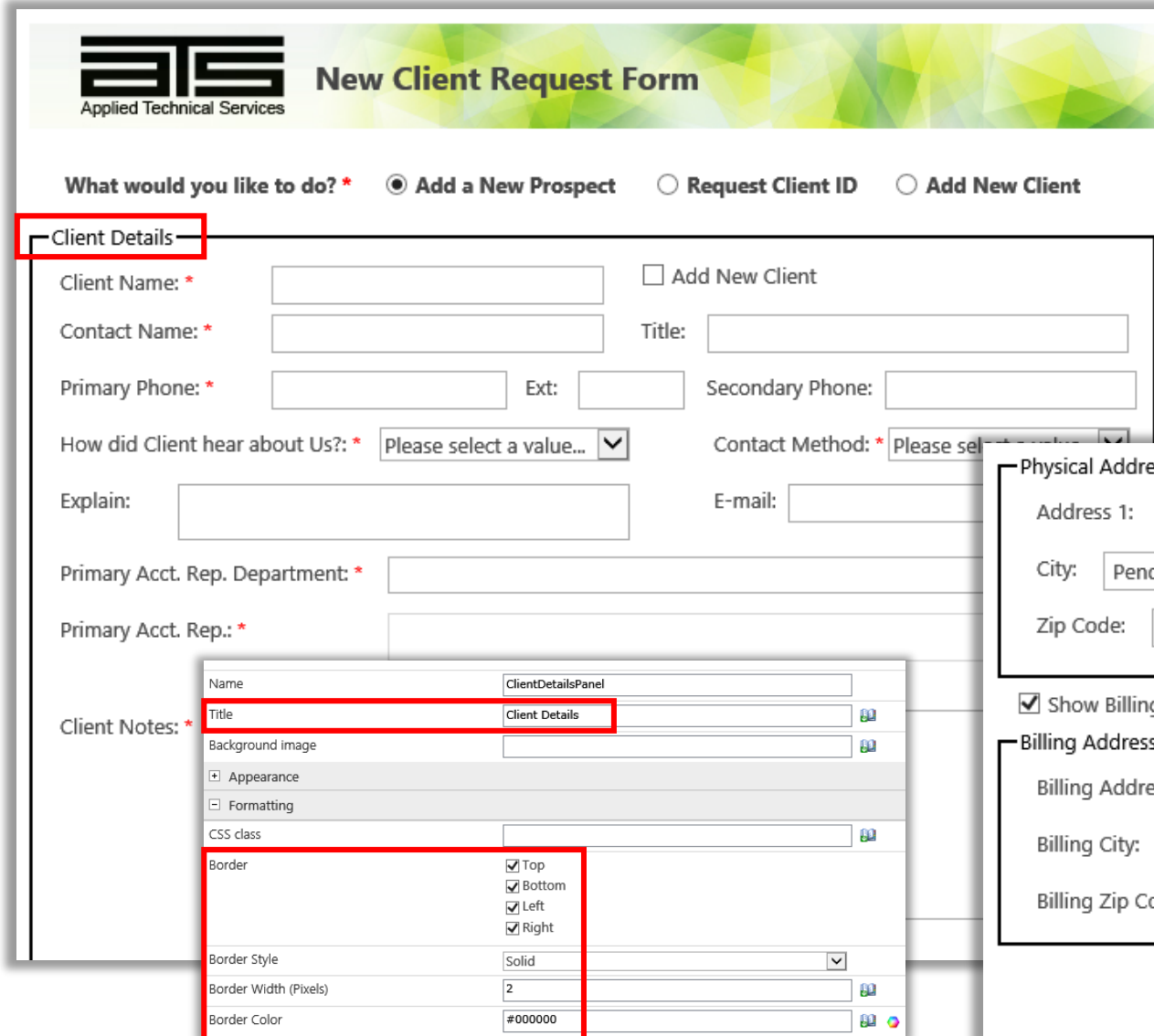
Student Site

Notes

Attachments
[+ Add Attachment](#)

"Save" button &
Internal Section

Panel Styling



ATS Applied Technical Services **New Client Request Form**

What would you like to do? * ☒ Add a New Prospect ☐ Request Client ID ☐ Add New Client

Client Details

Client Name: * ☐ Add New Client

Contact Name: * Title:

Primary Phone: * Ext: Secondary Phone:

How did Client hear about Us?: * Please select a value... Contact Method: * Please select a value...

Explain: E-mail:

Primary Acct. Rep. Department: *

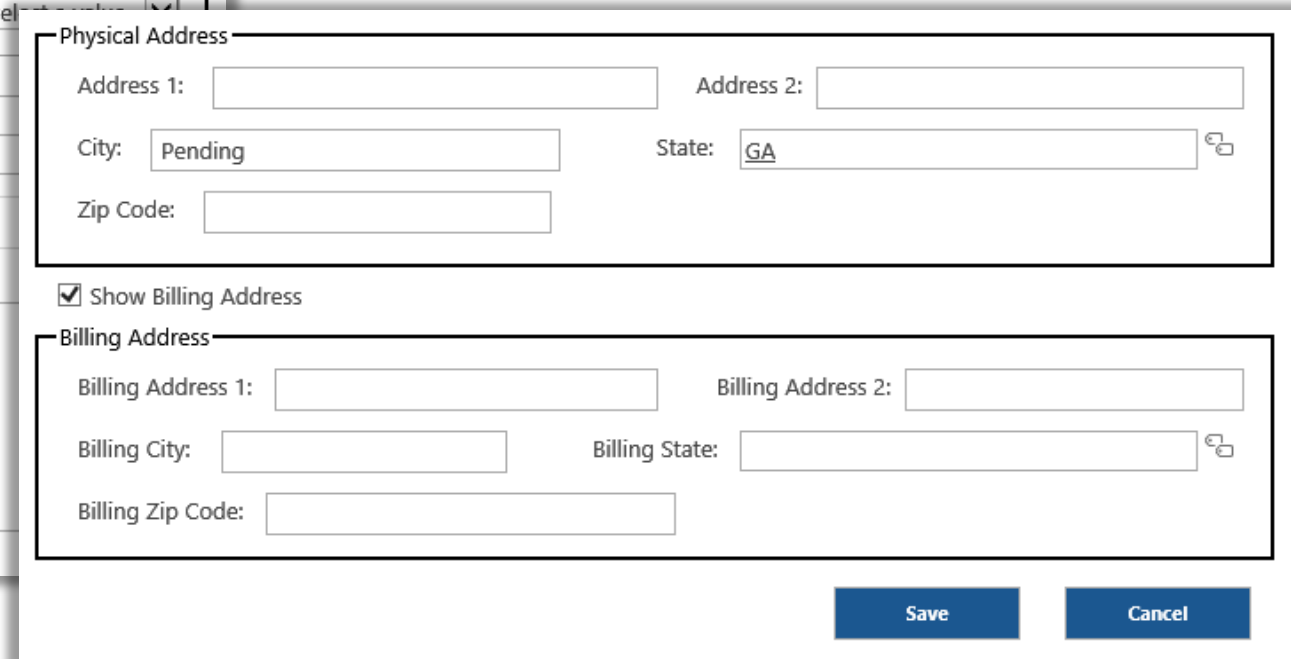
Primary Acct. Rep.: *

Client Notes: *

Styling Properties:

Name	
Title	Client Details
Background image	
Appearance	
Formatting	
CSS class	
Border	<input checked="" type="checkbox"/> Top <input checked="" type="checkbox"/> Bottom <input checked="" type="checkbox"/> Left <input checked="" type="checkbox"/> Right
Border Style	Solid
Border Width (Pixels)	2
Border Color	#000000

- Panel Title
- Panel > Formatting > Border
 - Select all sides
 - Increase Width: 2px
 - Border Color



Physical Address

Address 1: Address 2:

City: Pending State: GA

Zip Code:

☒ Show Billing Address

Billing Address

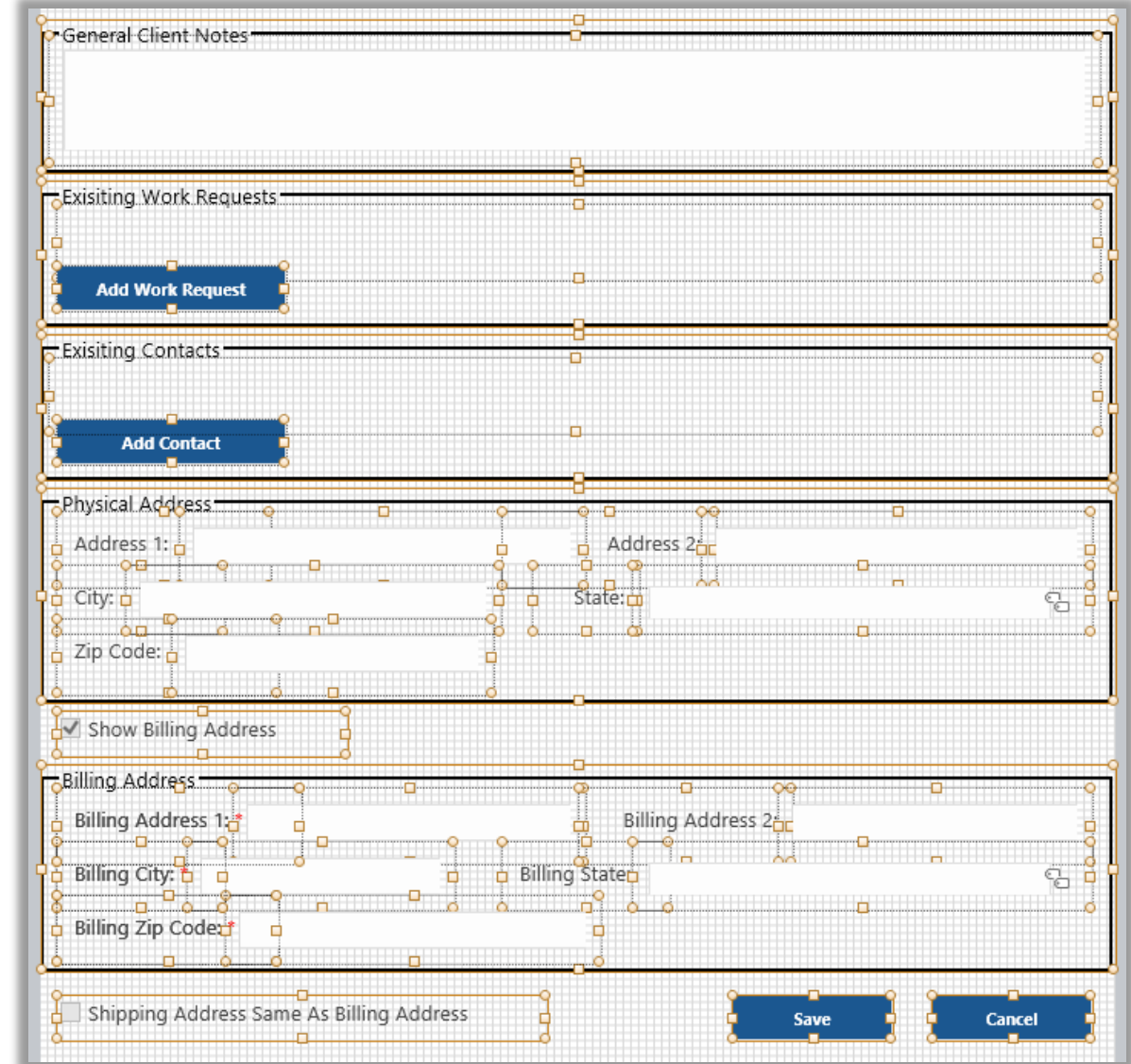
Billing Address 1: Billing Address 2:

Billing City: Billing State:

Billing Zip Code:

Hiding Panels

- Space when hidden will collapse, but...
 - Super finicky
 - Can't touch anything inside or outside panel
 - Make sure there is at least a couple of pixels inside and outside panel



The screenshot shows a web form with several panels. The 'General Client Notes' panel is collapsed. The 'Existing Work Requests' panel contains an 'Add Work Request' button. The 'Existing Contacts' panel contains an 'Add Contact' button. The 'Physical Address' panel contains fields for Address 1, Address 2, City, State, and Zip Code. The 'Billing Address' panel contains fields for Billing Address 1, Billing Address 2, Billing City, Billing State, and Billing Zip Code. A checkbox labeled 'Show Billing Address' is checked. At the bottom, there is a checkbox labeled 'Shipping Address Same As Billing Address' and two buttons: 'Save' and 'Cancel'. The form is overlaid with a grid and handles, indicating it is being edited or tested.

Admin Only Section

- Panel > Appearance > Visible > Expression
- Inline Function > IsMemberOfGroup

Control Settings - Panel

GENERAL

Save Cancel Help

Commit Help

Name

Title

Background image

☐ Appearance

Visible

Insert Reference

Common Item Properties Inline Functions

If
Insert
IsCurrentUser
IsDate
IsMemberOfGroup
IsNullOrEmpty
IsNumeric
Length
LessThan
LessThanOrEqual
Max
Min
NewGuid

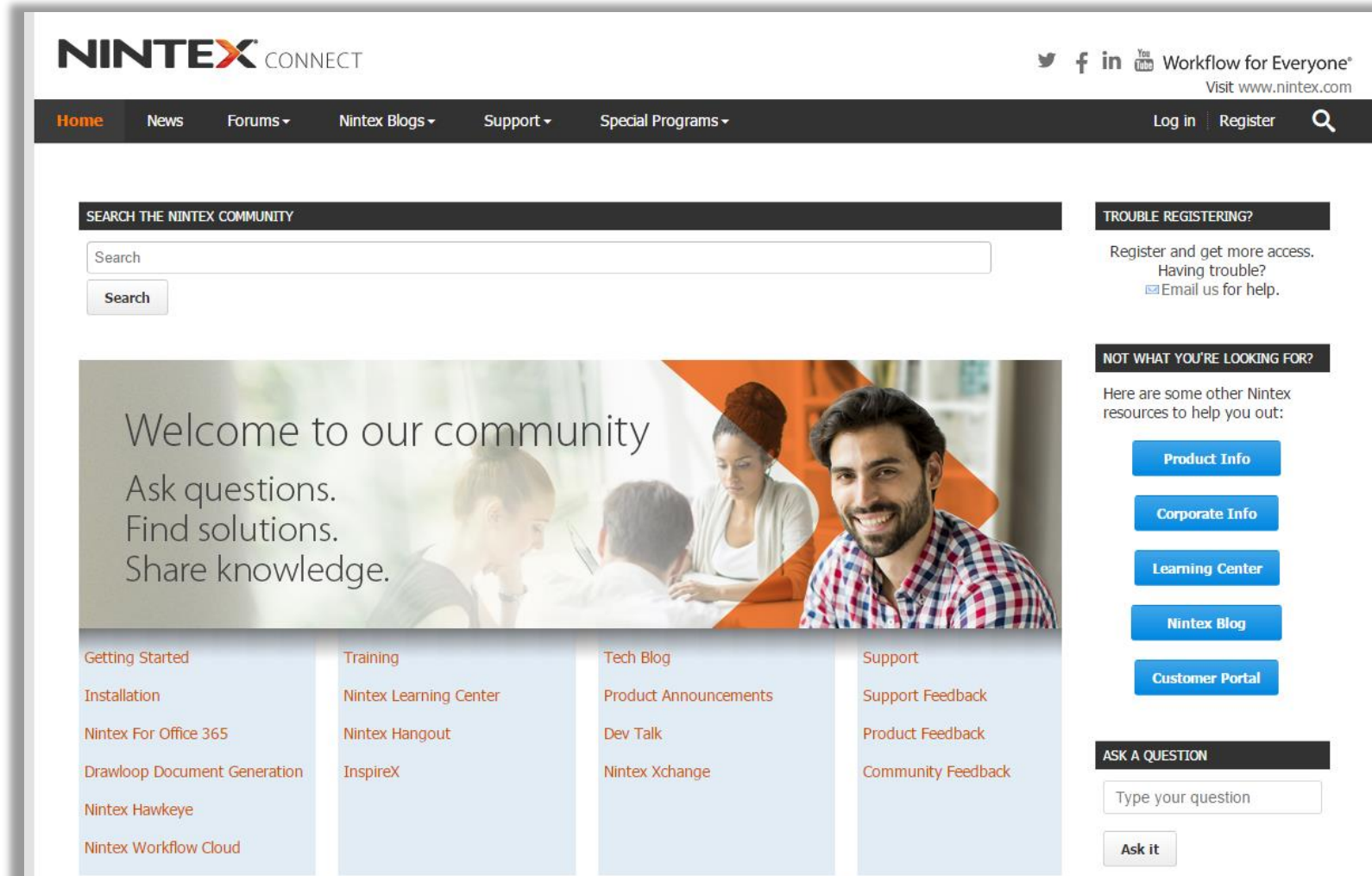
Returns true if the current user belongs to the group specified in
fn-IsMemberOfGroup(string groupname)

Dynamic text to insert

Resources



<https://community.nintex.com>



The screenshot shows the Nintex Connect community website. At the top, the Nintex Connect logo is on the left, and social media icons for Twitter, Facebook, LinkedIn, and YouTube are on the right, along with the tagline "Workflow for Everyone*" and the website URL "Visit www.nintex.com". Below this is a navigation bar with links for Home, News, Forums, Nintex Blogs, Support, and Special Programs. A search bar and links for Log in and Register are also present.

SEARCH THE NINTEX COMMUNITY

Search

Search

WELCOME TO OUR COMMUNITY

Ask questions.
Find solutions.
Share knowledge.

GETTING STARTED

- Installation
- Nintex For Office 365
- Drawloop Document Generation
- Nintex Hawkeye
- Nintex Workflow Cloud

TRAINING

- Nintex Learning Center
- Nintex Hangout
- InspireX

TECH BLOG

- Product Announcements
- Dev Talk
- Nintex Xchange

SUPPORT

- Support Feedback
- Product Feedback
- Community Feedback

TROUBLE REGISTERING?

Register and get more access.
Having trouble?
[Email us for help.](#)

NOT WHAT YOU'RE LOOKING FOR?

Here are some other Nintex resources to help you out:

- [Product Info](#)
- [Corporate Info](#)
- [Learning Center](#)
- [Nintex Blog](#)
- [Customer Portal](#)

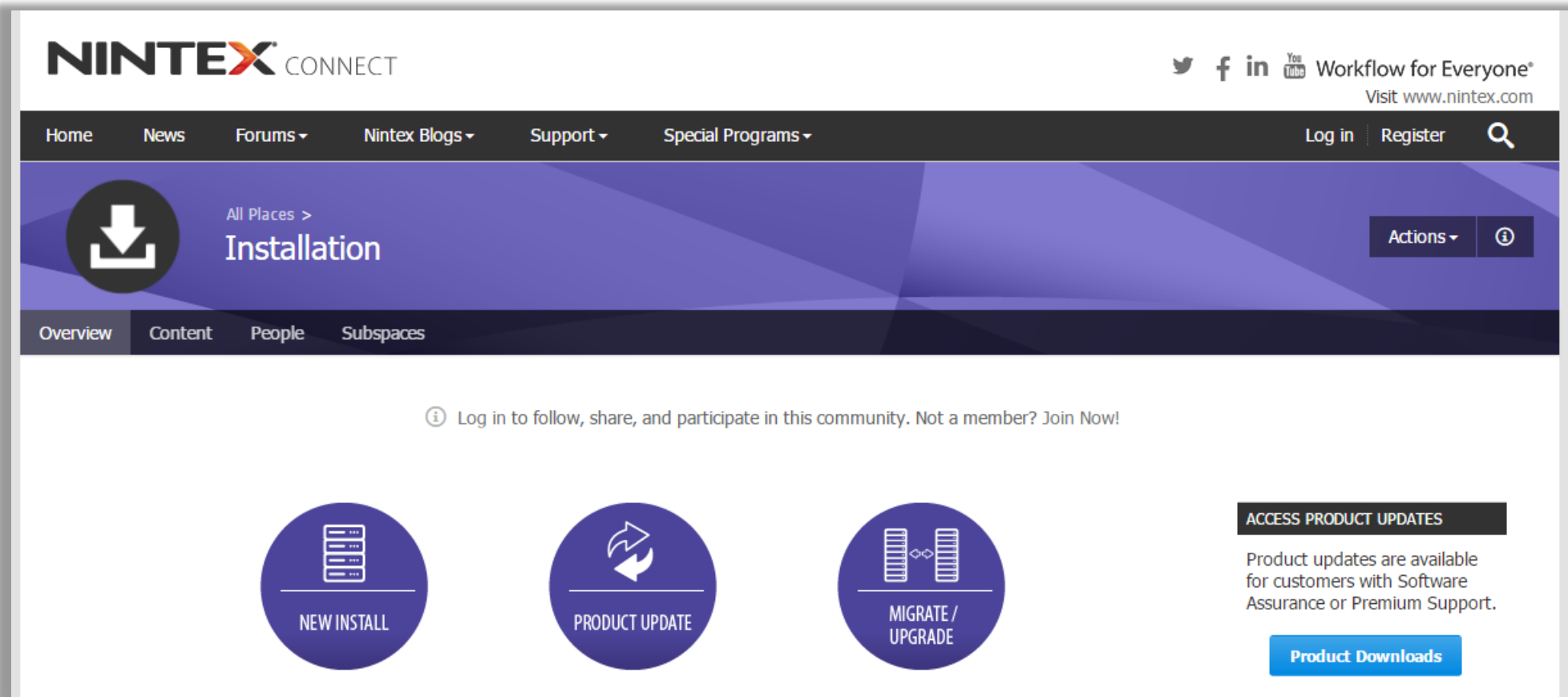
ASK A QUESTION

Type your question

Ask it

Nintex Connect – Installation

<https://community.nintex.com/community/installation>



The screenshot displays the Nintex Connect community website. At the top, the Nintex logo is followed by "CONNECT". To the right, there are social media icons for Twitter, Facebook, LinkedIn, and YouTube, along with the tagline "Workflow for Everyone*" and a link to "Visit www.nintex.com". Below this is a navigation bar with links for Home, News, Forums, Nintex Blogs, Support, and Special Programs. On the right side of the navigation bar are links for Log in and Register, and a search icon. The main header area has a large download icon and the text "All Places > Installation". To the right of this header are buttons for Actions and an information icon. Below the header is a sub-navigation bar with links for Overview, Content, People, and Subspaces. The main content area features a message: "Log in to follow, share, and participate in this community. Not a member? Join Now!". Below this message are three circular icons: "NEW INSTALL" (with a server icon), "PRODUCT UPDATE" (with a refresh icon), and "MIGRATE / UPGRADE" (with a database icon). To the right of these icons is a section titled "ACCESS PRODUCT UPDATES" which states: "Product updates are available for customers with Software Assurance or Premium Support." and includes a "Product Downloads" button.

NINTEX CONNECT

Workflow for Everyone*
Visit www.nintex.com

Home News Forums Nintex Blogs Support Special Programs Log in Register

All Places > **Installation** Actions ⓘ

Overview Content People Subspaces

ⓘ Log in to follow, share, and participate in this community. Not a member? Join Now!

NEW INSTALL

PRODUCT UPDATE

MIGRATE / UPGRADE

ACCESS PRODUCT UPDATES

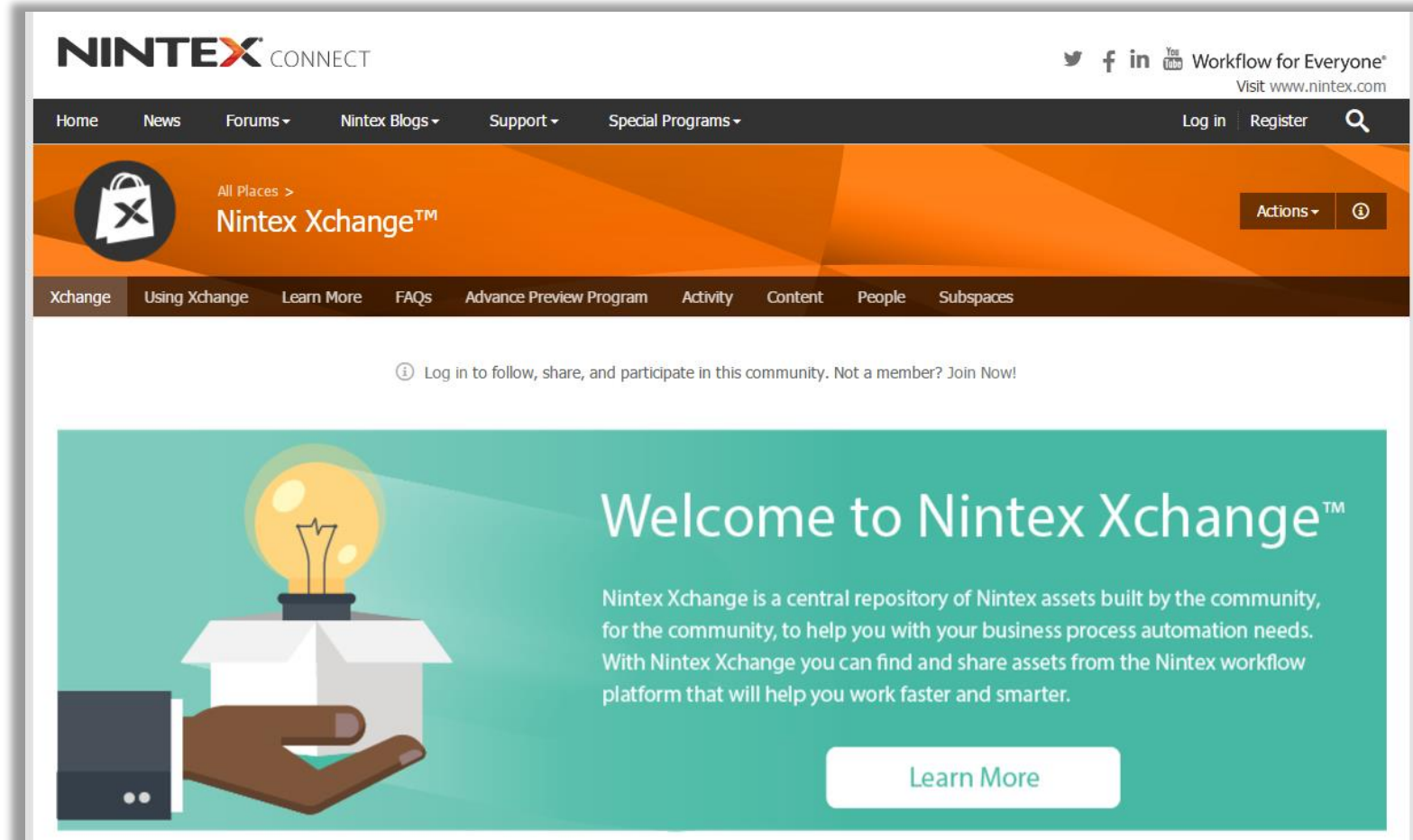
Product updates are available for customers with Software Assurance or Premium Support.

[Product Downloads](#)

Nintex Connect – Xchange



<https://community.nintex.com/community/xchange>



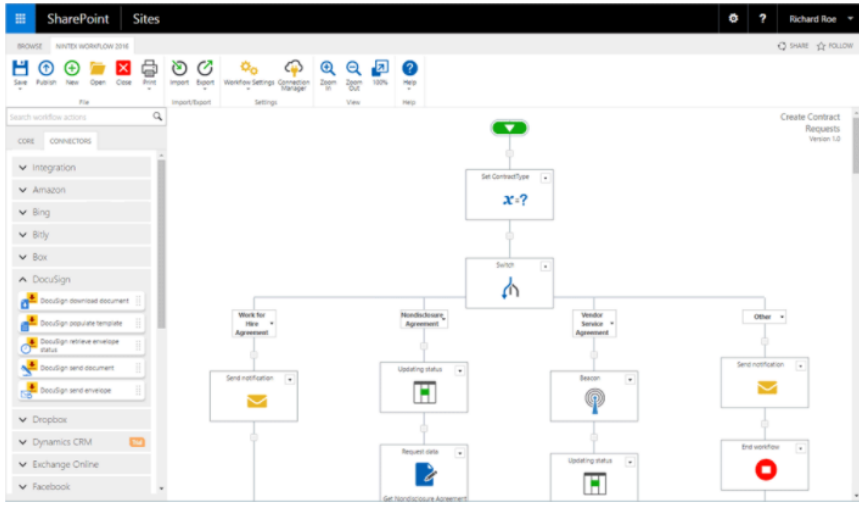
<https://learning.nintex.com>

NINTEX LEARNING CENTER Sign Out

Home > Welcome

WHAT'S NEW

Nintex for SharePoint 2016 has Released!



With Nintex Workflow and Nintex Forms with SharePoint 2016 you can easily design and deploy hybrid workflows that can interact between on-premises and cloud applications. You will enjoy a more intuitive user experience across all facets, including installation, administration, help and design with support for all major browsers.

Because Nintex for SharePoint 2016 is an update to Nintex for SharePoint 2013 you will find that your skills transfer easily to the new UI. As a result of this continuity we have updated individual

MY PROFILE

Nicole Prestby
nprestby@abelsolutions.com


[Change password](#) | [Go to My Activities](#)

MY HISTORY

0%


BETA, Nintex Workflow Dev Certificate - Practice Test

Last E-learning course progress



How to Visualize Your Nintex Hawkeye Data with Power BI

Last completed E-Learning course



256/100

Best score on E-Learning

20%

Managing Nintex with Hawkeye


Last Learning Plan progress


<http://help.nintex.com>


NINTEX Product assistance


Documentation


Select a product below to view the available documentation for current platforms.


 Nintex
Workflow Cloud


 Nintex
for SharePoint 2016

 Nintex
for Office 365


 Nintex
Mobile


 Nintex
App Studio


 Nintex
Drawloop


 Nintex
Hawkeye

Documentation for previous platforms.

 Nintex for SharePoint
2013 Help


 Nintex for SharePoint
2013 Installation


 Nintex for SharePoint
2010 Help


 Nintex for SharePoint
2010 Installation

Developers

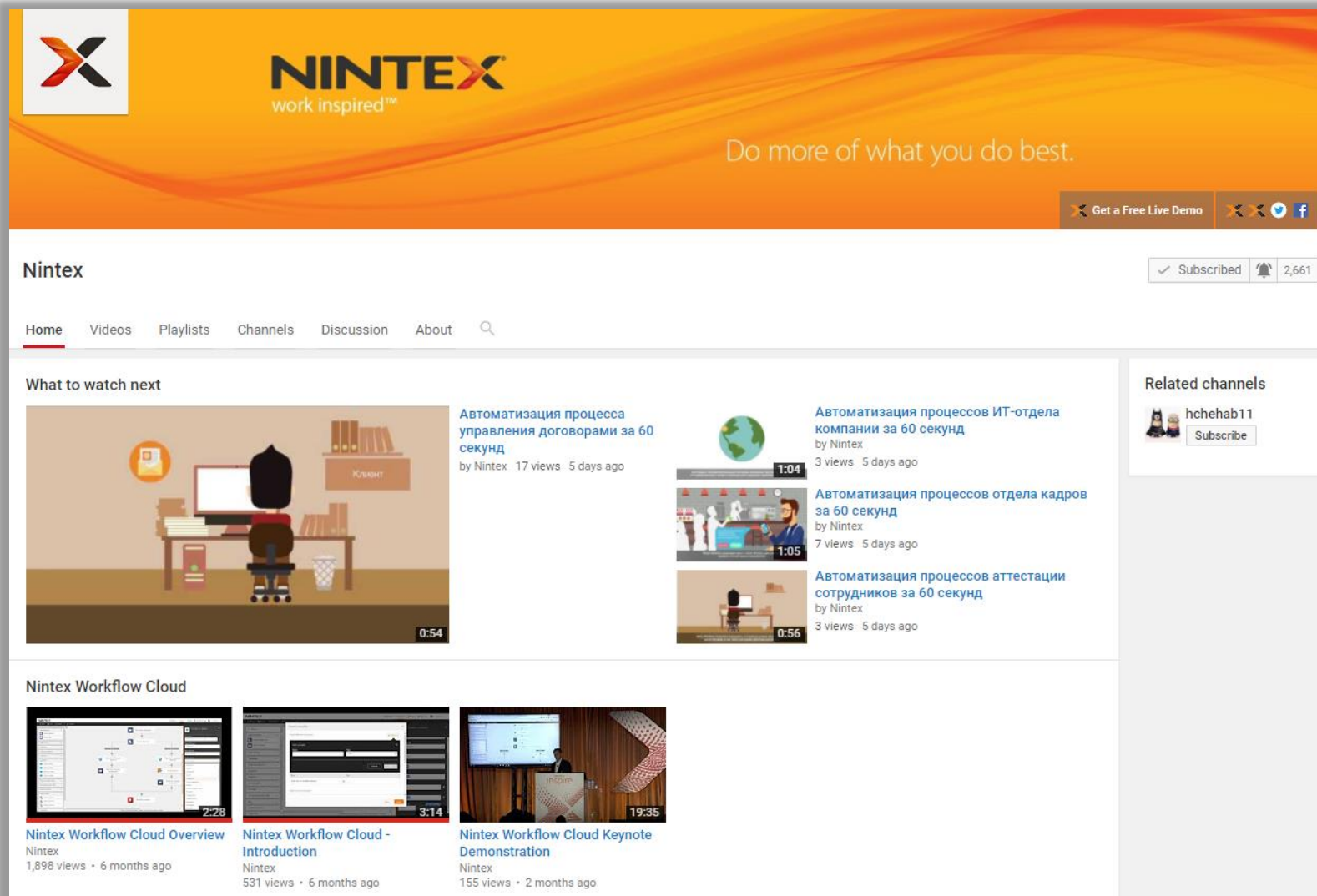
Amble through our SDK and samples to see how to interact with and extend our platform.

 Nintex
for SharePoint 2013

 Nintex
for Office 365 REST API

 Nintex Drawloop
Document Generation API

<https://www.youtube.com/user/Nintex>




The screenshot shows the Nintex YouTube channel page. At the top is a banner with the Nintex logo (a stylized 'X' in orange and black) and the tagline "work inspired™". To the right of the logo is the text "Do more of what you do best." and a button that says "Get a Free Live Demo". Below the banner is the channel name "Nintex" and a "Subscribed" button with a notification bell icon and the number "2,661". A navigation bar includes links for "Home", "Videos", "Playlists", "Channels", "Discussion", and "About".

The main content area is divided into two sections. The "What to watch next" section features a large video thumbnail of a person at a desk with a computer, titled "Автоматизация процесса управления договорами за 60 секунд" (Automatization of the contract management process in 60 seconds) by Nintex, with 17 views and posted 5 days ago. To the right of this are three smaller video thumbnails, each titled "Автоматизация процессов [IT-отдела / отдела кадров / аттестации сотрудников] за 60 секунд" (Automatization of [IT department / HR department / employee certification] processes in 60 seconds) by Nintex, with 3, 7, and 3 views respectively, all posted 5 days ago.

The "Nintex Workflow Cloud" section features three video thumbnails. The first is titled "Nintex Workflow Cloud Overview" with 1,898 views and posted 6 months ago. The second is titled "Nintex Workflow Cloud - Introduction" with 531 views and posted 6 months ago. The third is titled "Nintex Workflow Cloud Keynote Demonstration" with 155 views and posted 2 months ago.

On the right side of the page, there is a "Related channels" section featuring a channel named "hchehab11" with a "Subscribe" button.

<https://nintex.uservoice.com>



Customer Feedback for Nintex


New and returning users may [sign in](#)

Welcome to the Nintex Product Feedback Site

Use this site to provide feedback and ideas for all Nintex Products. Click on a product forum on the right-hand side or below to begin!

If you require support, please visit the [Nintex community](#) site.

If you have a sales enquiry, please contact sales@nintex.com



Give feedback

Feedback forums


1 - Nintex Workflow for SharePoint 543 ideas	6 - Nintex Mobile/App Studio 112 ideas
2 - Nintex Forms for SharePoint 304 ideas	7 - Nintex Advance Preview 4 ideas
3 - Nintex Workflow for Office 365 299 ideas	8 - Drawloop Document Generation 52 ideas
4 - Nintex Forms for Office 365 101 ideas	9 - Nintex Hawkeye 4 ideas
5 - Nintex Workflow Cloud 39 ideas	

Recently updated ideas

Nothing
DECLINED Updated 05/24/17 · [5 - Nintex Workflow Cloud](#)


Assign Flexi Task
COMPLETED Updated 05/22/17 · [3 - Nintex Workflow for Office 365](#)

This is only a test
COMPLETED Updated 05/09/17 · [5 - Nintex Workflow Cloud](#)



Give feedback

- 1 - Nintex Workflow for SharePoint 543
- 2 - Nintex Forms for SharePoint 304
- 3 - Nintex Workflow for Office 365 299
- 4 - Nintex Forms for Office 365 101
- 5 - Nintex Workflow Cloud 39
- 6 - Nintex Mobile/App Studio 112
- 7 - Nintex Advance Preview 4
- 8 - Drawloop Document Generation 52
- 9 - Nintex Hawkeye 4

 **Nintex**

Additional Tips

- Diagram the process
- Steps and notifications spreadsheet
- Conditional Start
- Log to history – “debug mode”
- Additional testing tips
- Cancel branch
- Run as WF Owner
- Common References
- WF Constants
- RegEx
- Custom Approval History on list item
- Admin section in emails
- Accommodate for restart
- Copy list item attachments to another list item
- Start WF action vs. web service call
- Nintex Live Form tips
- Preview doesn't always work

Abel Solutions Live 3-Day Training



- Nintex Workflow and Forms Training
- On-Prem or Office 365 (currently in development)
- Attend at our Alpharetta location or remotely
- Multiple hands-on exercises throughout each day
- Student training environment to practice and follow along
- Access to training environment for 10 days after class completion

- Next class: 6/27-6/29; **Registration Deadline: 6/20**

- For more information:
 - Visit our booth
 - Email Carol Reddaway at creddaway@abelsolutions.com
 - Visit www.abelsolutions.com/services/nintex-services/nintex-training

- Sign up for the Abel Solutions TOTM -
<http://www.abelsolutions.com/newsroom/sharepoint-tip-of-the-month/>

- Contact Me

 nprestby@abelsolutions.com

 nicoleprestby.wordpress.com

 @nprestby

 nprestby

- "Accelerate your Digital Transformation" event

FREE EDUCATIONAL EVENT

Come in from the digital "rain" and join Abel Solutions and Nintex for a day of new ideas and networking all designed to help you create a digital transformation for your company!

During the event you'll:

- Discover new techniques to unlock the power and promise of digital transformation
- Network with other IT professionals driving transformation initiatives
- Explore the latest Nintex and SharePoint solutions to automate content and workflows
- Learn how to make work less work

Don't be left out.

This is a totally FREE event, and lunch will be provided.

 ABEL SOLUTIONS



Wednesday, June 21



8:30 a.m. – 2:30 p.m.



Microsoft Technology Center
1125 Sanctuary Pkwy
Suite 300
Alpharetta, GA 30004

Register now at
<http://bit.ly/2smoCpX>