New Nintex Workflow 2010 Business Value:

Actions and Functions

Contents

Introduction

A number of new actions and features have been added to Nintex Workflow 2010 that were not present in its predecessor, Nintex Workflow 2007.

Some of these capabilities are extensions of the new features of SharePoint 2010, the platform on which it runs, while others are entirely native to the application itself.

This short article describes some, but not all of the new capabilities of Nintex Workflow 2010 within a business context. The goal is to illustrate the real-world value of each and provide ideas for how they might be implemented.

Drag and Drop CRM Integration

Drag-on actions can be used to read, modify and delete information in Microsoft CRM. Information read from CRM can be written to many different systems.

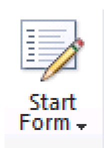
Business Value:

Business process integration with commercial data like customer records and sales transactions.

Examples of use:

- Notify sales staff when leads are created and automatically provide them with the related documents, company data and sales tools they need to do the job.
- Upload and synchronize CRM account information with data across your business: LOB databases, financial applications, SharePoint lists and libraries and more.

InfoPath Forms Design Integration



Automatically build InfoPath forms from within the Nintex Workflow designer.

Business Value:

Build custom forms for starting workflows and responding to tasks, allowing the addition of branding and functionality beyond the default, out-of-the-box versions. Launch InfoPath forms designer from Nintex Workflow and have it automatically populate the new form with the required fields.

Examples of use:

- create forms for users to interact with that look and feel like the rest of the company portal
- add your own custom code for additional functionality, such as showing or hiding previous approver comments

Document Assembly

Read and write from and to Office documents stored in SharePoint and convert Word documents to PDF and other formats.

Business Value:

Read and even modify the contents of an Office document automatically, during a business process. Take specific actions based on the contents of a document, populate existing documents with information stored across the enterprise and even convert Word documents to PDF as required.

Examples of use:

- assemble and send customer sign-off documents at the end of a project, populated automatically and delivered in PDF format
- route Office documents based on their actual contents without any additional forms to fill out

User Defined Actions: Reusable Integration

"Mini Workflows" can be packaged up and exposed in the design toolbox as simple drag-and-drop actions, requiring minimal configuration from workflow designers.

Business Value:

Many business processes require sequences of actions that are highly technical and often feature custom code, particularly when Nintex Workflow is communicating with other applications on the network. These action sequences can now be packaged up and hidden from designers, who instead are offered a single drag-on User Defined Action with a minimum of configuration to worry about.

Customers and partners can now build specialized pieces of integration to match particular environments that are simple for the end user and infinitely reusable.

Examples of Use:

- a UDA that queries an HR application to find an employee's annual leave balance: it asks for the leave type and gives back the balance for the initiating user

- a UDA that starts a billing process in a financial application when a sale is made: it asks for the type of sale, amount and customer and passes the information to the financial application sitting outside of SharePoint

Association Columns

List and column settings can be saved with the workflow. The same list and column settings can be imported, along with the workflow, during a subsequent migration or roll-out.

Business Value:

As a company's adoption of Nintex Workflow grows, it is likely to share processes between departments and geographical locations. Being able to package up all the necessary list or library settings inside the single workflow file that gets created at export, then being able to apply that configuration automatically when the workflow is imported means much less work for the administrators. It also means partners can create "one-stop shop" processes for their customers that are easy to implement.

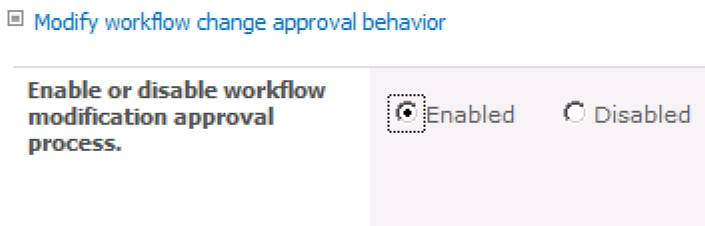
The same advantages apply during migration scenarios involving development and production environments.

Examples of Use:

- The sales department wants to give the marketing department their "capital expenditure request" workflow to use and manage separately from their own. They export it and include the association columns, for easy setup.
- A workflow has been fully tested in the customer's development environment and is now ready for roll-out in production. The association columns are exported along with it to minimize implementation time.

NOTE: This feature is a feature that MS have added to SharePoint 2010. Although we're surfacing the functionality for use within our own product, it's not something Nintex has "invented".

Workflow Change Control



If change control is activated, then workflow modifications are not published until an approval process has been successfully completed.

Business Value:

Being able to change a workflow means being able to change a company's business process. Often, it's the SharePoint or IT administrators who have these "change rights" on the system. Having a built-in approval process allows business stakeholders to manage the change, even if they don't have the IT skills required to make the change itself.

Examples of Use:

- The finance department needs changes made to its procurement process. After the IT implementer makes the modification to the workflow, the CFO is automatically contacted for final approval before the change is put into effect.
- The first-level IT support team in a company makes some changes to a critical workflow, as requested by the HR department. The IT manager receives an approval request and must give a positive response before the changes come into effect.

Reusable Workflows

Reusable workflows can be linked to an unlimited amount of lists and libraries in SharePoint and managed as a single process, in one place.

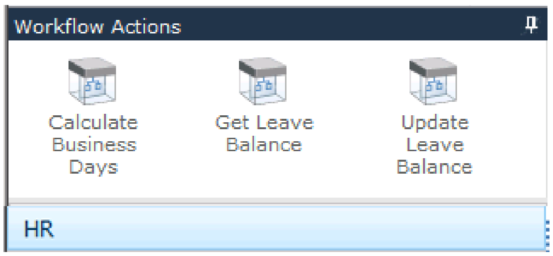
Business Value:

Medium to large companies often use the same process across multiple business units. Each of these business units might have their own lists and libraries in SharePoint where they want to run the process. Being able to simply link that single, common process to any list or library where it's required means the SharePoint administrators don't have to manage changes to multiple copies of the workflow whenever the process is updated.

Examples of Use:

Everyone in the company uses the same leave request process to request holiday time, but various business units have their own dedicated team sites. A single leave request workflow is created and linked to all the appropriate team sites. When the company leave request process changes, the SharePoint administrators only have to change one workflow.

Custom Toolboxes



Apply user and group permissions to the individual actions that make up the design toolbox. Hide certain actions from certain users.

Business Value:

The ability to simplify the designer toolbox makes it easier for typical end users to build basic workflows. Risk can also be minimized by hiding actions from implementers that could have serious impact on the network.

Examples of Use:

- The HR manager wants to design a simple approval process, which the IT department will then extend and implement. When he accesses the design canvas, he's presented with a small set of actions he recognizes intuitively and uses to build his process. When the IT team accesses the same workflow they see all of the actions in the toolbox, including some advanced tools they need to finish the job.
- Workflows are created by two teams in the same IT department: one team who build fairly simple workflows using a limited toolset and a second team who have access to actions capable of having a serious impact on systems and permissions on the network.