Enterprise Workflow & Process Automation with SharePoint, Office 365 & Nintex

Gig Werks

SharePoint

Office 365

Nintex

www.Gig-Werks.com
About Gig Werks

Be it in the Cloud with Office 365 or on premise, Gig Werks has delivered award winning targeted and focused business solutions for departments and industries, built on Microsoft SharePoint.

Microsoft Awards & Recognition

- Microsoft Gold Partner since the firm’s beginning in 2001
- Virtual Technology Specialists for the Microsoft New York Enterprise Group
- 5 Time Microsoft SharePoint Technical Excellence Partner Award Winner
- Approved Vendor of Microsoft Legal and Corporate Affairs Group (LCA)

Deep relationship with Nintex

- Nintex Partner Award Winner 2015
- Serves on the Nintex Partner Advisory Board
- Certified Nintex Technical Evangelist

Deep Industry Experience in:

- Legal, Financial Services, Architecture/Engineering/Construction, Healthcare/Pharmaceutical, Professional Services

Expertise around Full Capabilities:

- Office 365, SharePoint, Cloud Applications, Business Intelligence and Microsoft Stack
# Packaged Solutions & Offerings

## Packaged Solutions

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<td>Premium Advisory Services Plan – Modernize the Enterprise</td>
<td>Managing Your SharePoint &amp; Cloud Services with Gig Werks</td>
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<td>SharePoint &amp; Office 365 Workshop</td>
<td>Quick Start &amp; Training Workshop</td>
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<td>SharePoint Business Solution Planning</td>
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Workflow in SharePoint

• Every Business has Processes

• Workflows help...
  • Automate and Manage Business Processes
  • Ensure Processes are Consistent and Repeatable

• SharePoint bridges the gap between knowledge & toolset

• Interacts with existing SharePoint technologies
  • Lists and Libraries (including External Lists)
  • Tasks
  • Email
  • InfoPath
Microsoft Flow

Create automated workflows between your favorite apps and services to get notifications, synchronize files, collect data, and more. You can connect to SharePoint Online or to an on-premises SharePoint 2013 or 2016 farm using the On-Premises Data Gateway to manage documents and list items.

- **Create Multistep Flows**
  - Turn repetitive tasks into multistep workflows. For example, with a few clicks capture tweets and add them as leads in Dynamics 365, subscribers in Mailchimp, and more.

- **Add in Conditions to your Workflow**
  - Make decisions in your workflow, like running an action only when certain conditions are met.

- **Use on-premise or cloud data**
  - Flow lets you securely connect to on-premises data and cloud based services, so you can make the most of the data you already have.

- **Work Securely**
  - Prevent sensitive data from leaving your company using built-in or customized data loss prevention policies.
Why 3rd Party Applications

- Out of the Box feature doesn’t exist
- Reduces Risk and Drives High Return on Investment
- Don’t “Recreate the Wheel”
- Need for Specific Business or Industry Solution or Functionality
- Scalability and Easy Upgrade / Migration
- Speed to Market
- Satisfy Regulatory Requirements or Compliance
- Product and Solution Support
Objectives for digital transformation

- Closer to customers
- More efficient
- More agile & innovative
- More competitive
- More profitable

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Nintex for Workflow

Nintex Workflow for Office 365 and SharePoint enables organizations to extend business process automation to more people, places and devices, delivering workflow for everyone. Nintex Workflow adds a drag-and-drop workflow designer, advanced connectivity, and rich workflow features to give customers more power and flexibility.

Benefits and ROI of Nintex Include:
• Reusable templates and modules
• Share and align business practices across teams
• Reduced IT burden
• Efficiency gains and reduced processing costs
• See real-time status of workflows
• Measure and improve business performance
• Built-In ROI Calculator
• Lazy Approval
Nintex Workflow for Office 365

Connect to a range of cloud services

• Integrate and connect Office 365 workflows to a host of cloud services in real-time including Yammer, Box, Twitter, virtual machines and other applications.

• Quickly add web services without writing a single line of code; and publish forms to collaborate with external vendors, partners, and customers.

Use Nintex Store for workflow action needs

• Contains hundreds of actions for you to build integrated, document-centric, and Office 365-centric workflows that help you drive your business.

• Seamlessly connect Nintex Workflow to external systems such as Microsoft Dynamics CRM, web services, and applications most relevant to your business.
Nintex Connectors Include

- Adobe
- Adobe Sign
- Amazon Web Services
- Bing
- Bitly
- Box
- Dropbox
- Dropbox Business
- Exchange
- Facebook
- FullContact
- Google
- Google Drive
- HubSpot
- Jira
- LinkedIn
- MailChimp
- Marketo
- Microsoft Azure
- Microsoft Dynamics CRM
- MySQL
- NetSuite
- OneDrive
- PostgreSQL
- PostgresQL
- RackSpace
- Salesforce CRM & Service Cloud
- Slack
- ServiceNow
- StrikeIron
- Stripe
- SharePoint
- Office 365
- Twitter
- WordPress
- Wufoo
- Yammer
- Zendesk
## Example Business Solution & Process Automations with Nintex Workflow

### Auditability & Compliance
- Compliance Approval Workflow
  - Keep a Full Audit Trail of Approvals
- Performance Approval Workflow
  - Confirm Accuracy of Performance & Portfolio Reports
- Pre-Trade Clearance Workflow
  - Ensure Stock Trades are Legally Made

### Finance & Administration
- Expense approvals
- Bank account management
- Loan approvals
- Invoice processing
- Accounts Receivable/Payable
- Governance and compliance
- Legal documentation and processing
- Pre-trade clearance

### Human Resources
- Leave requests
- Employee on-boarding and off-boarding
- Annual performance reviews
- Succession planning
- Complaints handling
- Travel requests

### Operations
- Procurement and work order approvals
- Facilities management
- Field data gathering
- Purchase orders
- Bank loan approvals
- Supplier and contract management
- New product development
- Project management

### Contract Management Automation

### Sales and Marketing
- Sales opportunity management
- Marketing campaign management
- Campaign approval process
- Sales account provisioning
- Sales order processing

### Information Technology
- IT help desk service requests
- User account provisioning
- SharePoint site collection management
- Hardware and software provisioning
- Hardware maintenance and upgrades

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Workflow as a Service Empowers Process Analytics

Nintex Hawkeye
Intelligent Document Creation with Nintex

Automate the Generation Of:

- Contracts
- Quotes
- RFP’s
- Proposals
- Account Plans
- Inventory Reports
- Activity Logs
- Case History
- Pipeline Reviews
- Renewals
- Response Letters
- Work Order Summaries
- NDA’s
- MSA’s
- Licensing Agreements
- Consumption Reports
- Financial Pitch Books
- Statements of Advice
- Annual Reports
- Invoices
- Quote metrics
- Forecasts
- Business Reviews
- Commission Reports
- Legal Advice
- Terms & Conditions
- Customer Correspondences
- Notifications for Doctors, Pharmacists & Customers
- Project Summaries
- Candidate Profiles
- Repair Orders

Any Content, Any Source
Create Documents
Consistent Delivery

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Intelligent Document Creation with Nintex

- Re-usable, Bulletproof data
- Improve accuracy & compliance by eliminating risk of errors & omissions
- Assemble data from across the enterprise intelligently from virtually any data source
- Forms driven automation of document creation in Word, PDF, PowerPoint & Excel
- Drive Significant Time Savings and Rapid Return On Investment (ROI)

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Nintex Workflow Demonstration

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Questions & Answers

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