

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



# 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)
- Invited into the Partner Evidence Program for SharePoint 2007, 2010, 2013 & 2016

## 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

### Premium Advisory Services Plan – Modernize the Enterprise

*Managing Your SharePoint & Cloud Services with Gig Werks*

### SharePoint & Office 365 Workshop

*Quick Start & Training Workshop*

### SharePoint Business Solution Planning

*Plan your SharePoint initiatives with Gig Werks*

### Nintex Workflow Quick Start

*Nintex Installation, Configuration & Training Workshop*

### Compliance Approval Workflow Quick Start

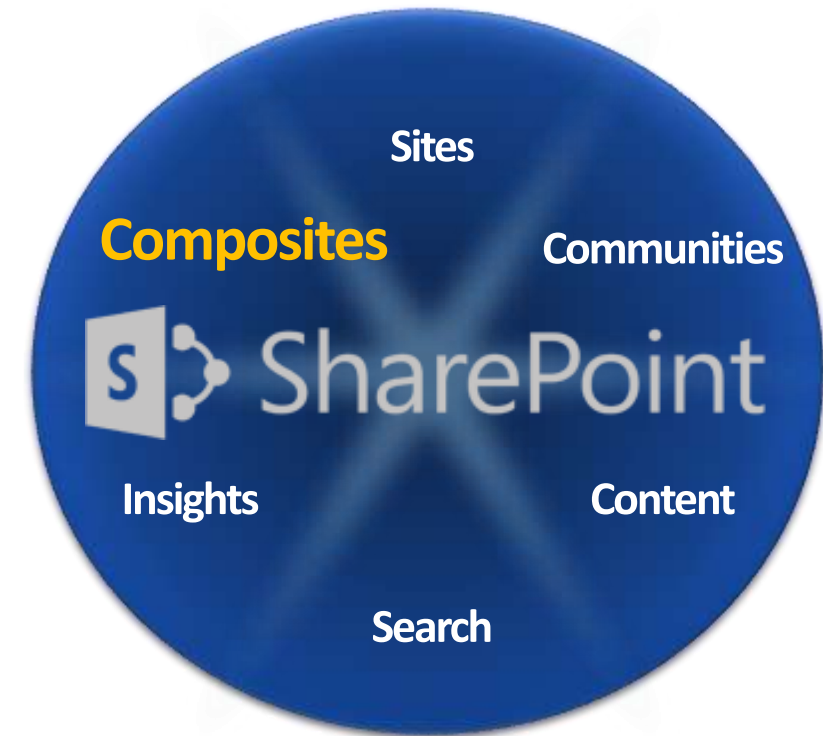
*Workflow Implementation & Report Generation*

### SharePoint Modernization Assessment

*Plan to move your processes to modern applications*

# 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 3<sup>rd</sup> 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



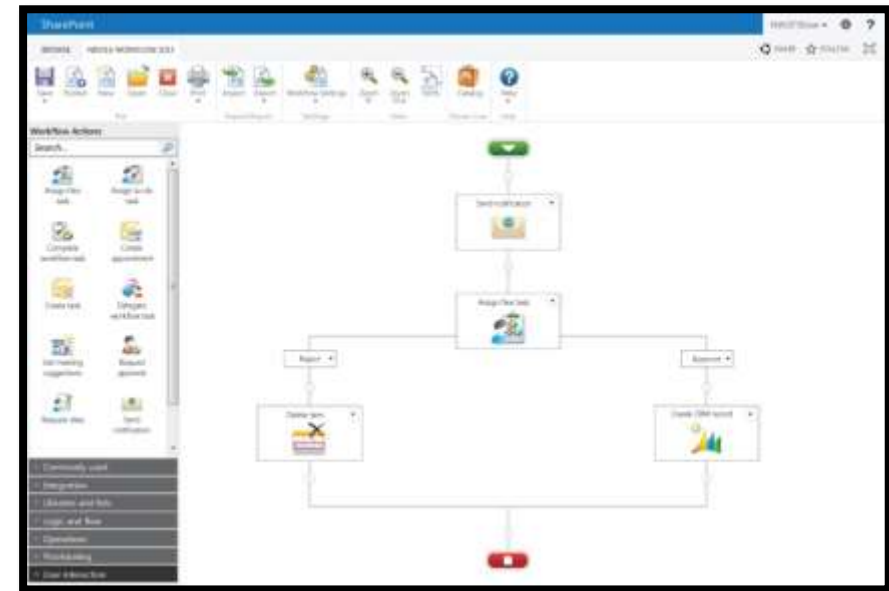
- ✓ Closer to customers
- ✓ More efficient
- ✓ More agile & innovative
- ✓ More competitive
- ✓ More profitable

# 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



# 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

# Workflow as a Service Empowers Process Analytics



**Nintex Hawkeye**

# Intelligent Document Creation with Nintex

## Automate the Generation Of:

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

**NINTEX**



**Any Content, Any Source**



**Create Documents**



**Consistent Delivery**

# 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)

**NINTEX**



Any Content, Any Source



Create Documents



Consistent Delivery

# Nintex Workflow Demonstration

**Sean Fiene**

**NINTEX**<sup>®</sup>

# Questions & Answers

**Go to the Question Tab on your GoToWebinar Control Panel and  
Type Your Questions to be Answered**

**Please Do Not Forget to fill out the survey as you leave the webcast  
to receive Today's PowerPoint & Webcast Recording**

## **Contact Us**

[www.Gig-Werks.com](http://www.Gig-Werks.com)

[info@gig-werks.com](mailto:info@gig-werks.com)

914-207-1110

@GigWerks

[www.YouTube.com/GigWerks](http://www.YouTube.com/GigWerks)

[www.Facebook.com/GigWerks](http://www.Facebook.com/GigWerks)