



Tutorial - Designing a Nintex Workflow Start Form

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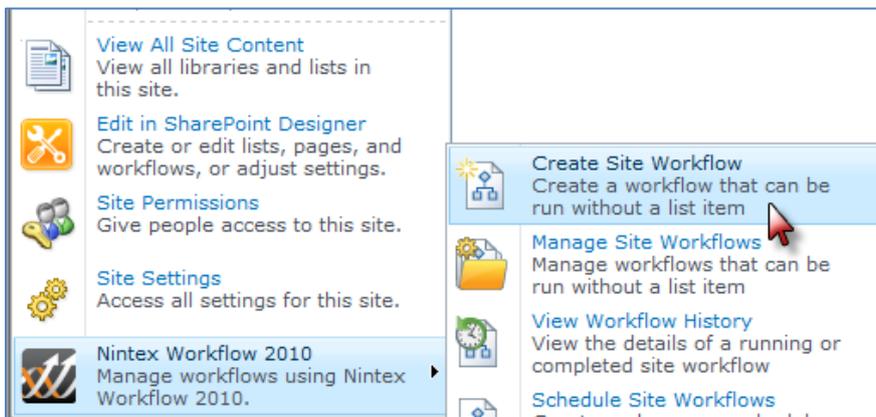
Introduction

This tutorial will demonstrate how to:

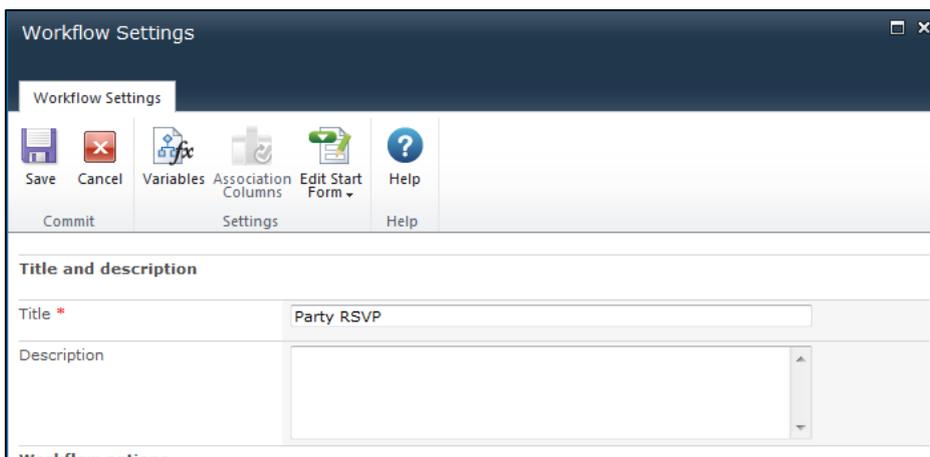
1. Create a site workflow that will allow users to RSVP for a party using a workflow start form and send an email notification to the party organizer.
2. Configure the Nintex Forms Start Site Workflow web part to host the RSVP start form created in the step above.

Creating a site workflow

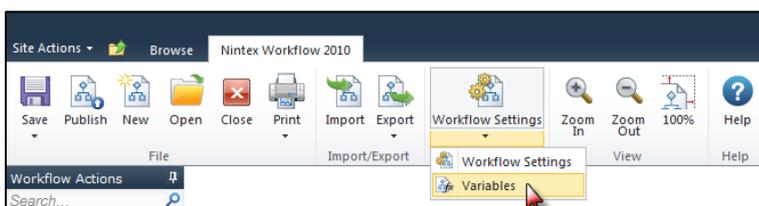
1. Navigate to a SharePoint Team Site.
2. Click on **Site Actions > Nintex Workflow 2010 > Create Site Workflow**.



3. In the **Nintex Workflow 2010** Ribbon, click on **Workflow Settings**.
4. In the **Workflow Settings** dialog change the **Title** to “Party RSVP”.

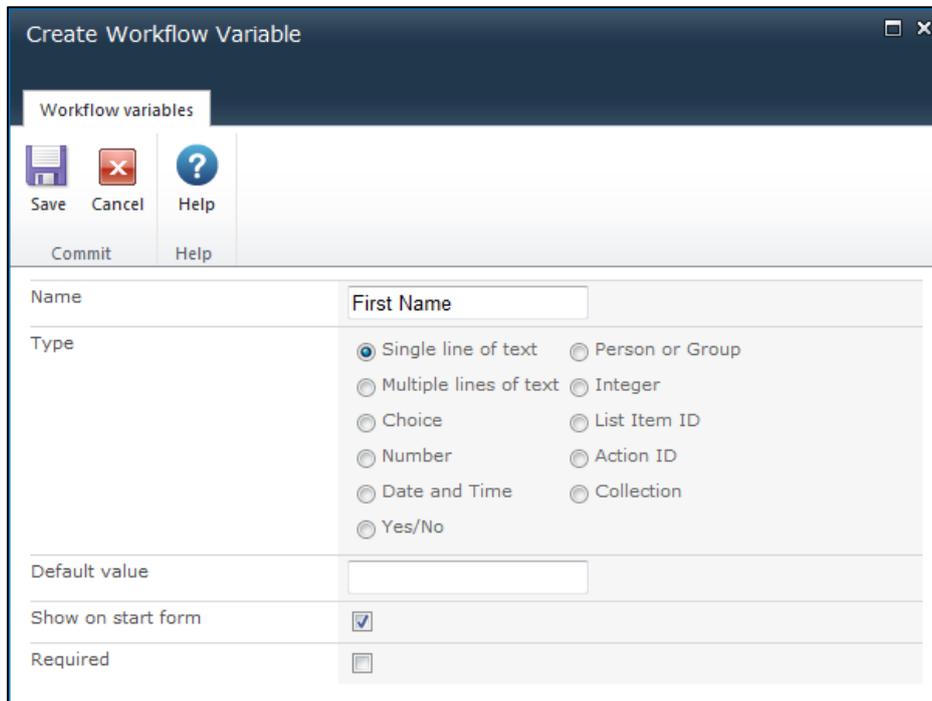


5. Click **Save**.
6. In the **Nintex Workflow 2010** Ribbon, select the **Workflow Settings** drop-down and then **Variables**.



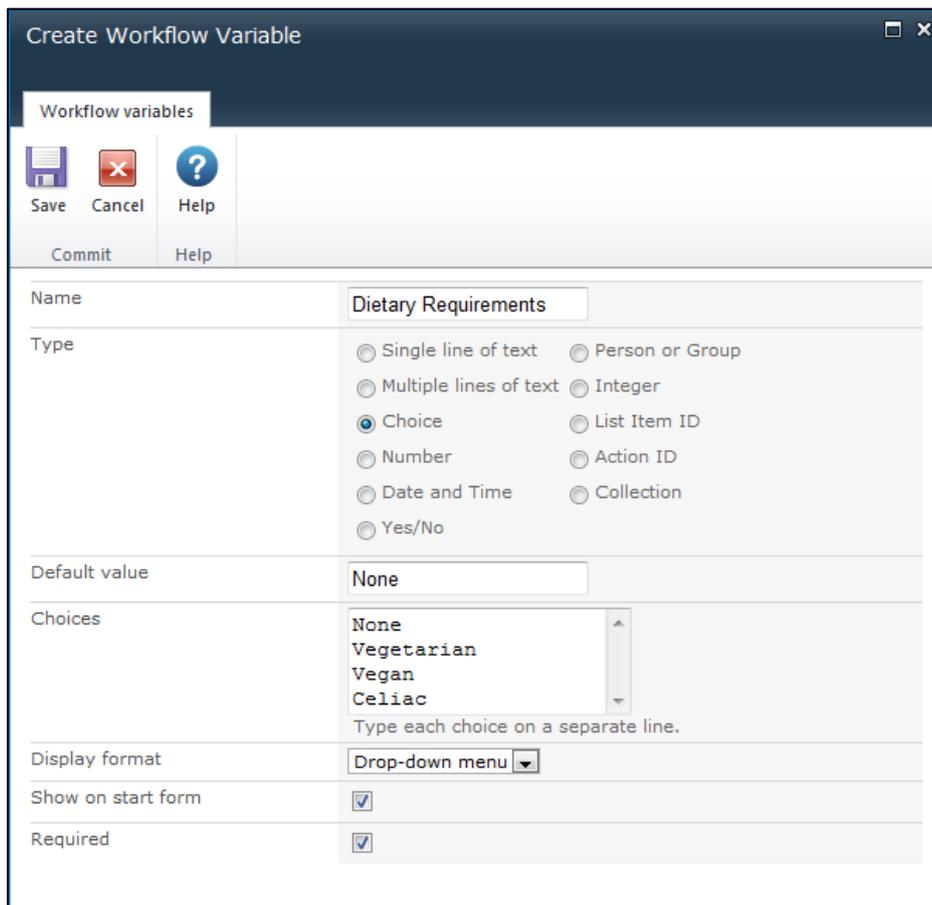
7. The **Workflow Variables** dialog will open.
8. Select the **New** button from the **Workflow variables** Ribbon.
9. Enter “First Name” in the **Name** field.

10. Select **Single line of text** in the **Type** field.
11. Select **Show on start form**.



Workflow variables	
Save	Cancel
Commit	Help
Name	First Name
Type	<input checked="" type="radio"/> Single line of text <input type="radio"/> Person or Group <input type="radio"/> Multiple lines of text <input type="radio"/> Integer <input type="radio"/> Choice <input type="radio"/> List Item ID <input type="radio"/> Number <input type="radio"/> Action ID <input type="radio"/> Date and Time <input type="radio"/> Collection <input type="radio"/> Yes/No
Default value	
Show on start form	<input checked="" type="checkbox"/>
Required	<input type="checkbox"/>

12. Click **Save**.
13. Repeat steps 9 – 12 to create a “Last Name” variable.
14. Create a new variable:
 - a. Select the **New** button from the **Workflow Variables** Ribbon.
 - b. Enter “Dietary Requirements” in the **Name** field.
 - c. Select the **Type** as **Choice**.
 - d. Enter the following options “None”, “Vegetarian”, “Vegan”, and “Celiac”, in the **Choices** text box.
 - e. Select **Drop-down menu** as the **Display Format**.
 - f. Select **Show on start form**.
 - g. Click **Save**.



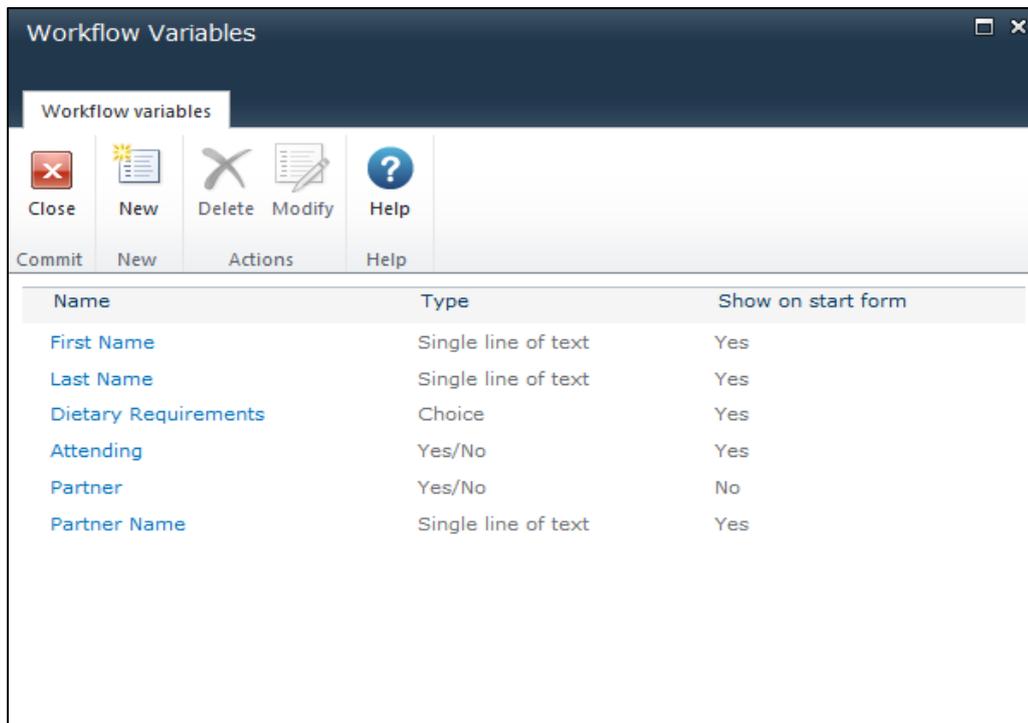
The screenshot shows the 'Create Workflow Variable' dialog box with the following configuration:

- Name:** Dietary Requirements
- Type:** Choice (selected)
- Default value:** None
- Choices:** None, Vegetarian, Vegan, Celiac
- Display format:** Drop-down menu
- Show on start form:**
- Required:**

15. Create the following new variables:

- h. Attending
 - i. Enter “Attending” in the **Name** field.
 - ii. Select the **Type** as **Yes/No**.
 - iii. Select **Yes** in the **Default** value.
 - iv. Select **Show on start form**.
 - v. Click **Save**.
- i. Partner
 - i. Enter “Partner” in the **Name** field.
 - ii. Select the **Type** as **Yes/No**.
 - iii. Select **No** in the **Default** value.
 - iv. Select **Show on start form**.
 - v. Click **Save**.
- j. Partner Name
 - i. Enter “Partner Name” in the **Name** field.
 - ii. Select the **Type** as **Single line of text**.
 - iii. Select **Show on start form**.
 - iv. Click **Save**.

16. The following **Workflow Variables** should now be created:

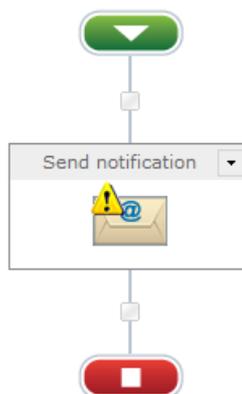


Name	Type	Show on start form
First Name	Single line of text	Yes
Last Name	Single line of text	Yes
Dietary Requirements	Choice	Yes
Attending	Yes/No	Yes
Partner	Yes/No	No
Partner Name	Single line of text	Yes

17. Close the **Workflow Variables** dialog box.

The next step details how to send an email with all of the collected information.

18. From the **Workflow Actions** toolbox, drag a **Send notification** action onto the canvas.



19. To configure, double-click on the center of the **Send Notification** action.

20. Configure the **Send notification** action.

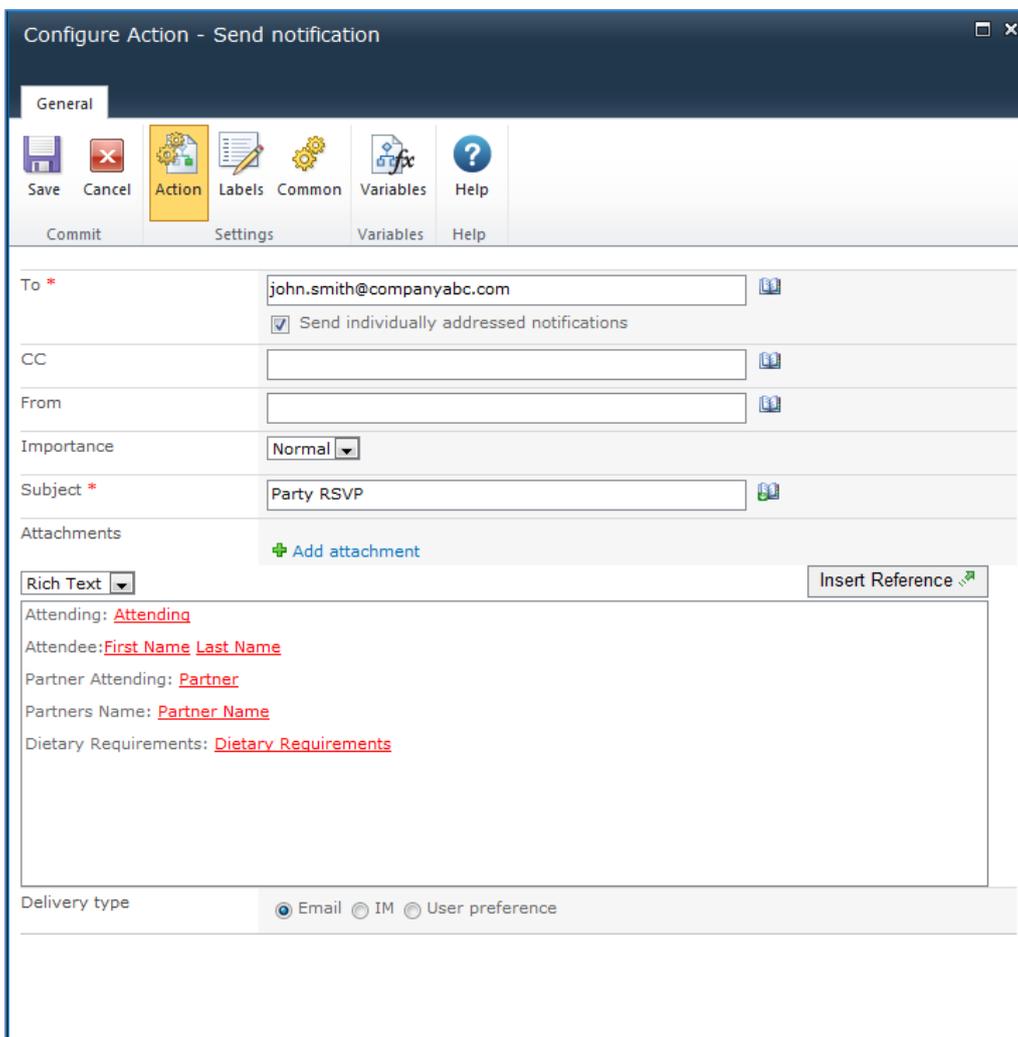
- a. Enter the recipients email address in the **To** box.
- b. Enter "Party RSVP" in the **Subject** box.

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To create the body of the email, enter the desired text and Workflow Variables in the textbox.

To insert the references:

1. Type “Attending:” into the textbox.
2. Click on the **Insert Reference** button.
3. Select the **Workflow Variables** tab.
4. Select **Attending** and then **OK**.
5. Press the return button to start on a new line.
6. Repeat steps 1-5 to insert the **Attendee** and remaining references to compose the message as shown below.
7. Click on **General** tab and **Save**.



Configure Action - Send notification

General

Save Cancel Action Labels Common Variables Help

Commit Settings Variables Help

To * john.smith@companyabc.com 

Send individually addressed notifications

CC 

From 

Importance Normal 

Subject * Party RSVP 

Attachments [+ Add attachment](#)

Rich Text  [Insert Reference](#) 

Attending: [Attending](#)

Attendee: [First Name Last Name](#)

Partner Attending: [Partner](#)

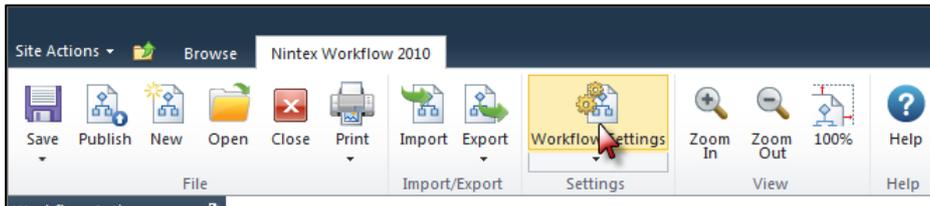
Partners Name: [Partner Name](#)

Dietary Requirements: [Dietary Requirements](#)

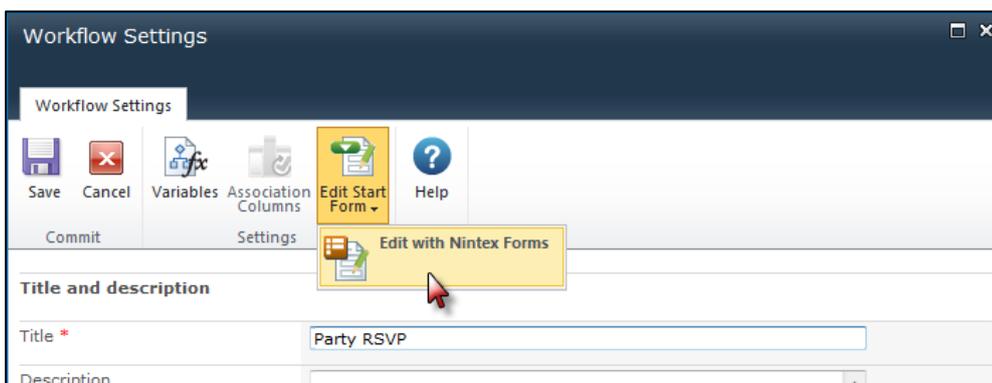
Delivery type Email IM User preference

Designing the Start Form of the Workflow

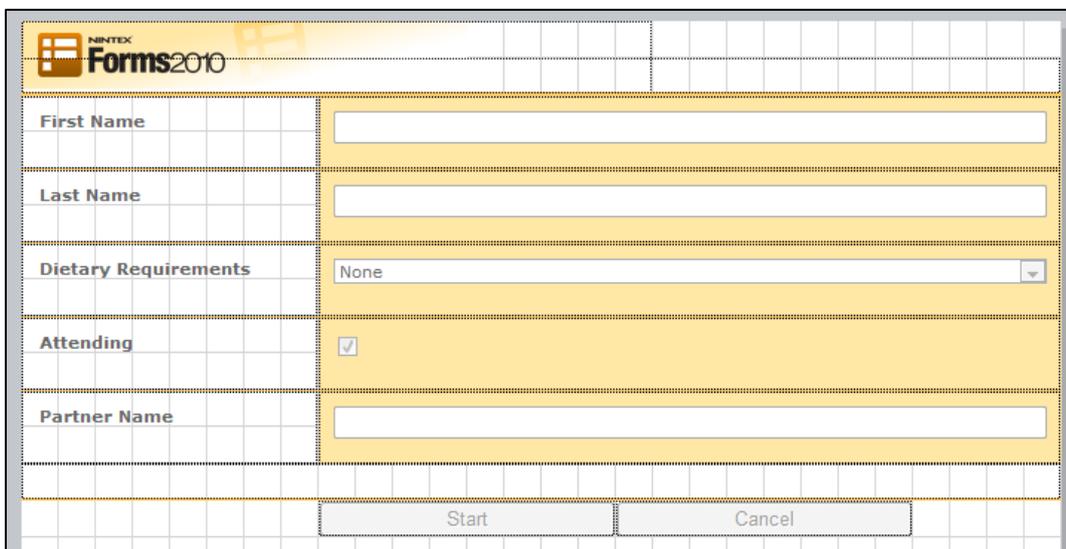
1. Click the **Workflow Settings** button in the **Nintex Workflow 2010** Ribbon.



2. Select the **Edit Start Form** drop-down in the **Workflow Settings** Ribbon and select **Edit with Nintex Forms**.



3. The form will open configured with the Workflow Variables that were previously set to **Show on Start Form**.



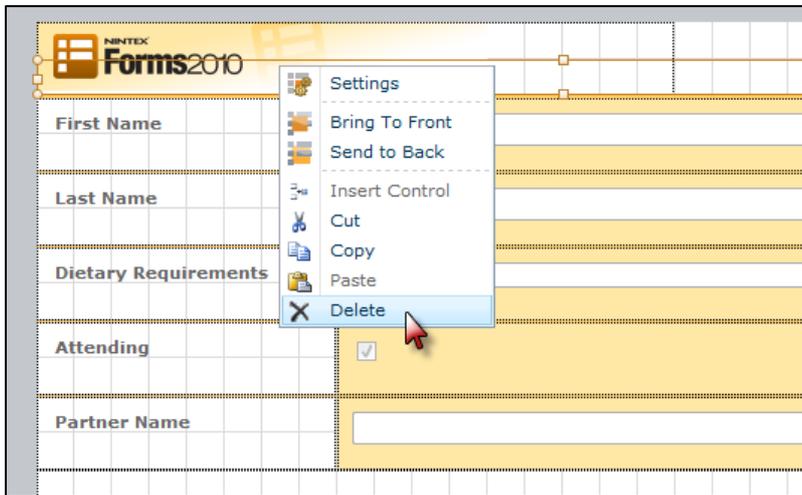
The screenshot shows the Nintex Forms 2010 start form for a 'Party RSVP' workflow. The form is displayed on a grid background and contains the following fields:

- First Name**: Text input field.
- Last Name**: Text input field.
- Dietary Requirements**: Dropdown menu with 'None' selected.
- Attending**: Check box, which is checked.
- Partner Name**: Text input field.

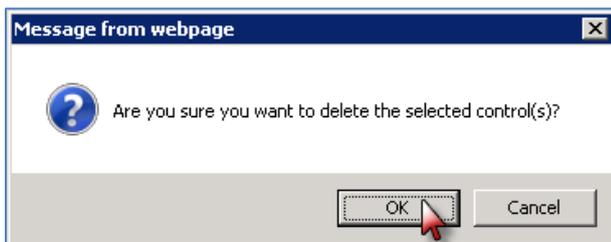
At the bottom of the form, there are two buttons: 'Start' and 'Cancel'.

Nintex Forms 2010: Tutorial – Designing Nintex Workflow Start Form

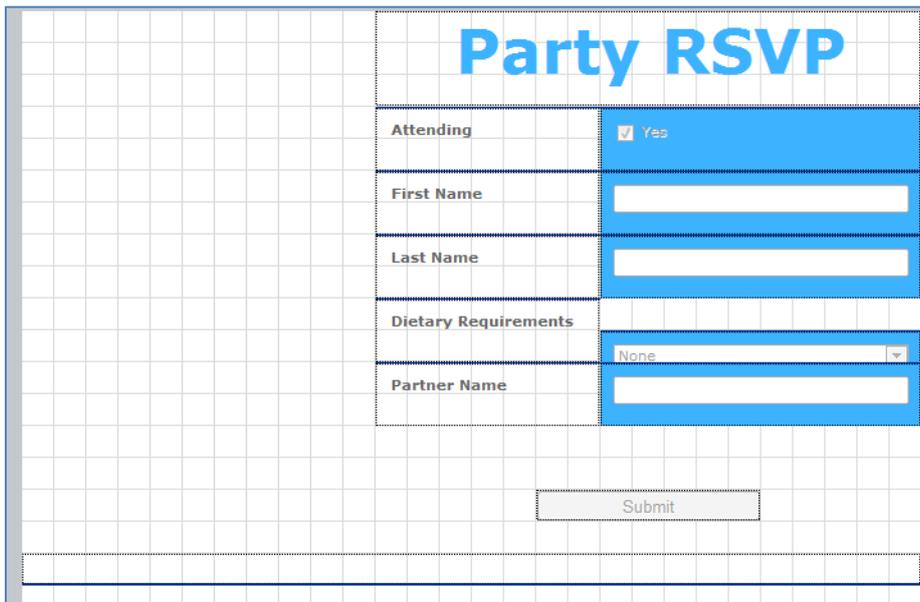
- Right-click on the **Nintex Forms 2010** form banner and select **Delete**.



- In the warning dialog, click **OK**.



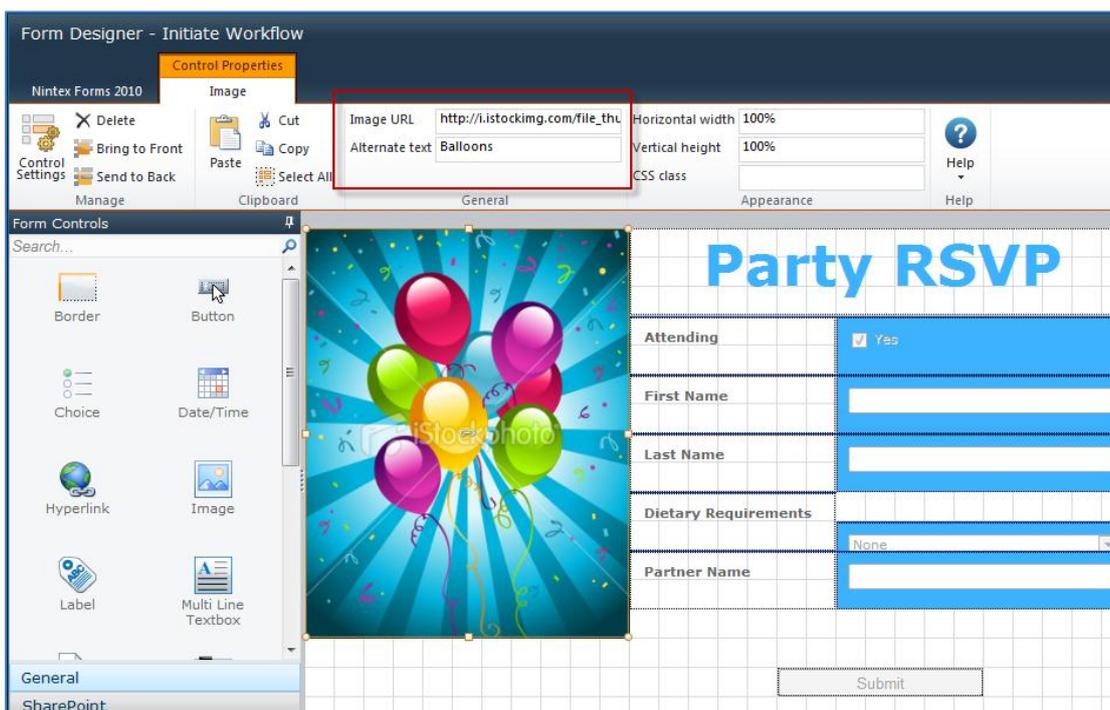
- Select the **Cancel** button. Repeat steps 4-5 to remove from design canvas.
- From the **Form Controls** toolbox, select the **Label** control and drag it onto the design canvas.
- Select the **Label** control and edit the text to display "Party RSVP". Format the control so that it looks like a title for the form.
- Rearrange the controls on the form as desired. Below is an example.
Note: Hold down the **Ctrl** key while selecting both the label and control.



Note: In the screenshot above, the colors in custom CSS styles (.nf-form-input, .nf-section, .nf-section-bottom) have been modified.

10. From the **Form Controls** toolbox, select the **Image** control and drag it onto the design canvas.
11. Select the **Image** control.
12. Locate **Image URL** in the **Control Properties** Ribbon. Enter:

“http://i.istockimg.com/file_thumbview_approve/14552950/2/stock-illustration-14552950-party-balloons.jpg”.
13. Enter “Balloons” in **Alternate text**.
14. The image will appear on the form. Resize and rearrange the image control as desired.



15. Double-click on the **Start** button control.
16. In the **General** section, change the **Button label** to “Submit”.

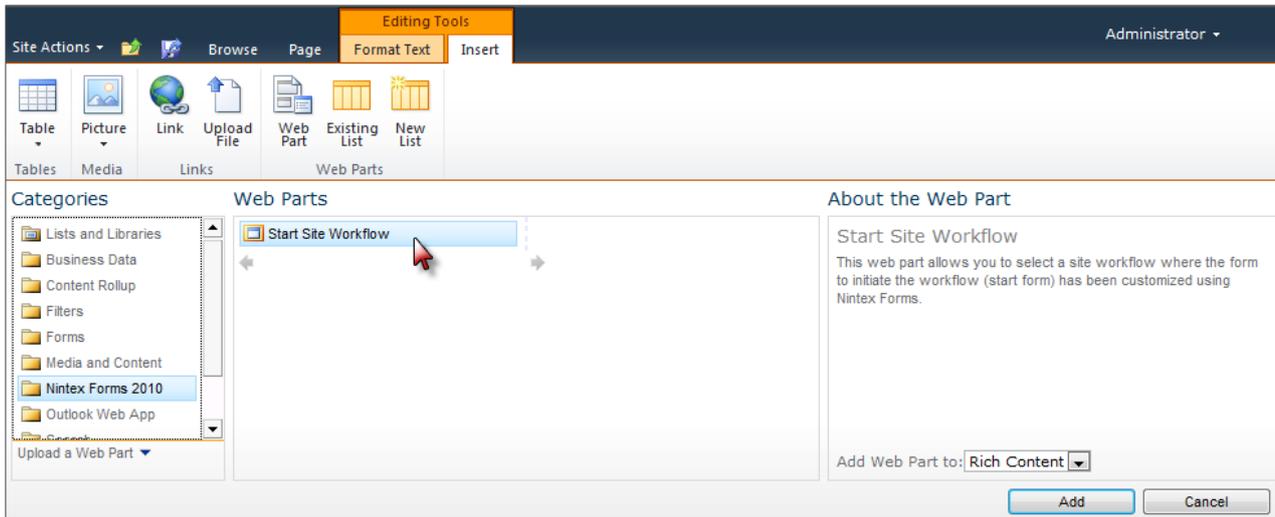


17. Click **Save**.
18. To change the text on the **Attending Yes/No** control and the **Partner Yes/No** control:
 - a. Double click the **Yes/No** control.
 - b. Change the **Text** to “Yes” in the **General** section.
 - c. Click **Save**.
19. In the **Nintex Forms 2010 Ribbon**, click **Save** and **Close**.
20. **Save** and **Publish** the site workflow.

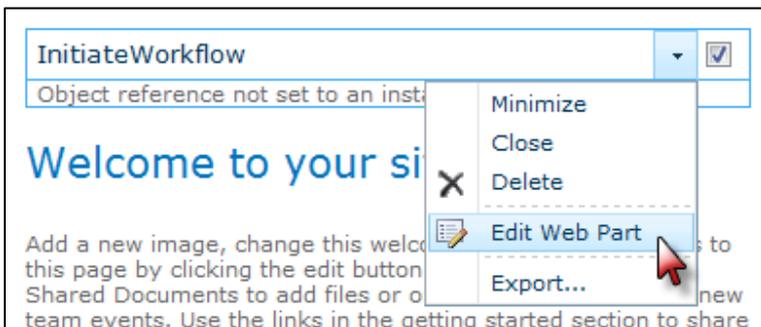
The site workflow and its start form have now been created, configured and published.

Configure the Nintex Forms Start Site Workflow web part

1. Navigate to the SharePoint page you want to add the Party RSVP form to.
2. Select the **Page** tab and click the **Edit** button on the Ribbon.
3. Select the **Insert** tab and click the **Web Part** button on the Ribbon.
4. Select **Nintex Forms 2010** in the **Categories** section. Select **Start Site Workflow** from the Web Parts section.

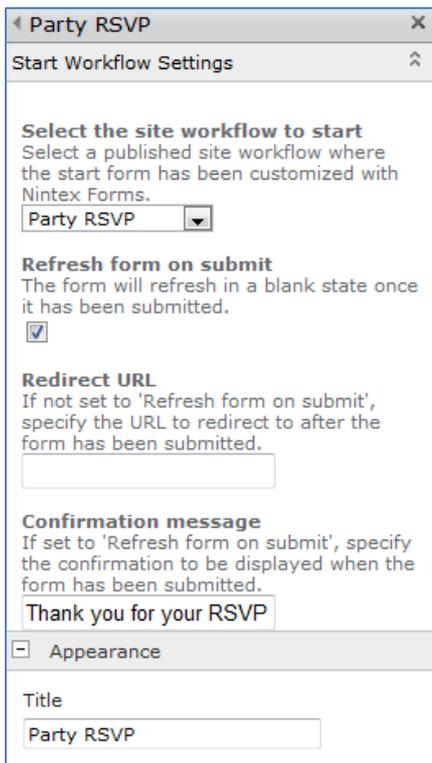


5. Click the **Add** button.
6. Edit the settings for the web part. Click the **Workflow** drop-down to activate the web part menu and select **Edit Web Part**.



7. In the **Start Workflow Settings** section:
 - a. Select the **Party RSVP** workflow from the **Select the site workflow to start** drop-down.
 - b. Change the **Confirmation Message** to “Thank you for your RSVP”.

- Change the **Title** of the web part to “Party RSVP” in the **Appearance** section.



The screenshot shows a configuration window titled "Party RSVP" with a close button (X) in the top right corner. Below the title bar is a "Start Workflow Settings" section with an expand/collapse arrow (^). The main content area includes:

- Select the site workflow to start:** A dropdown menu is set to "Party RSVP".
- Refresh form on submit:** A checkbox is checked, with the text "The form will refresh in a blank state once it has been submitted."
- Redirect URL:** A text input field is empty, with the text "If not set to 'Refresh form on submit', specify the URL to redirect to after the form has been submitted."
- Confirmation message:** A text input field contains "Thank you for your RSVP", with the text "If set to 'Refresh form on submit', specify the confirmation to be displayed when the form has been submitted."

Below the main settings is an "Appearance" section, which is currently collapsed. It contains a "Title" label and a text input field containing "Party RSVP".

- Leave the other options as the defaults and click **OK**.
- Click **Page** tab.
- Save** and **close** page.
- The Party RSVP form will now be displayed in the SharePoint Web Part.

Party RSVP



Party RSVP

Attending	<input checked="" type="checkbox"/> Yes
First Name	<input type="text"/>
Last Name	<input type="text"/>
Dietary Requirements	None <input type="button" value="v"/>
Partner Name	<input type="text"/>

13. Enter your details and click **Submit**.
14. The following email will be sent.

