Installation Guide

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System Requirements

Operating System

Nintex Analytics 2010 can be installed on Microsoft Windows Server 2008 Standard, Enterprise Data Center, or Web Server with SP2, or the 64-bit-edtion of Windows Server 2008 R2 Standard, Enterprise, Data Center, or Web Server.

Note: You must update Windows Server 2008 before you run Setup.

Browser Client

Supported browsers to design reports, administer Nintex Analytics and view configured reports: Internet Explorer 7+ (All browsers must support Silverlight 4.0 to view reports).

Software

Nintex Analytics 2010 requires that the following software is installed and correctly configured:

- Microsoft Silverlight 4.0 for client browsers (servers do not need to have this installed)
- Microsoft SharePoint Foundation Services 2010 or Microsoft SharePoint Server 2010
- Microsoft .NET Framework 3.5
- ADO.NET Data Services Update for .NET framework 3.5 SP1
- 64 bit edition of Microsoft SQL server2005 SP3 OR 64 bit edition of Microsoft SQL Server 2008 SP 1 CU 2 (note not recommended on CU3 or CU4 but CU 2 or higher than CU5) OR Microsoft SQL Server 2008 R2 OR the 64- bit edition of Microsoft SQL Server 2012

Important notice regarding accounts used for installation and configuration

The installation of Nintex Analytics 2010 requires a service account to run the following services:

- Active Directory Service
- Data Management Service
- Performance Monitor Service
- SharePoint Foundation Service
- SharePoint Server Service

Nintex Analytics 2010 uses SharePoint Managed Accounts for all services. Please ensure that the chosen account to run the Nintex Analytics services has been configured as a SharePoint Managed Account prior to running the Configuration Wizard.

1. Installing Nintex Analytics 2010

1.1 Run the Installer

1. Login to the server as a SharePoint administrator with sufficient privileges to deploy solutions and features. Double-click the installer file (msi) and click "Next".
2. Read the End-User License Agreement. You must select "I Agree" for the installation to proceed. Click "Next".
3. Select a location to install Nintex Analytics 2010. The default location is C:\Program Files\Nintex\Nintex Analytics 2010\ then click "Next".
4. The installer will inform you it is ready to proceed. Click "Next".
5. After a short while the installation complete screen will appear. Click the "Close" button. The Nintex Analytics Configuration Wizard will start, if not go to Start > All Programs > Nintex Analytics 2010 and click "Nintex Analytics Product Configuration Wizard".

2. Nintex Analytics 2010 Configuration Wizard

2.1 Running the Nintex Analytics 2010 Configuration Wizard

1. Once the Nintex Analytics Configuration Wizard has loaded, click "Next" to continue.
2. A restarting services warning message will appear. Click "Yes" to continue.
3. Import your Nintex Analytics 2010 license file. Click "Import license", browse to your (.nlf) license file and click "Open". The Nintex Analytics 2010 License information will be displayed. Click "Next".
4. Nintex Analytics uses SharePoint Managed Accounts for its services. Select "Managed Service Account" and click "Next". Nintex recommends that the SharePoint Farm Managed Account is used to run the service, this ensures that the services will be able to collect all the information from the SharePoint farm.
5. Nintex Analytics uses five different databases to store:
    *   Configuration information
    *   Data collected by the services
    *   Results from scheduled reports
    *   Results from On Demand reports, and
    *   Temporary caching data.

    You can specify which SQL server will host these databases. If Windows Authentication is selected, the service account chosen in the previous step will be applied. Click "Next".

6. Select the SharePoint site URL for the Nintex Analytics Report Center.
7. Click "Browse" and use the site picker which appears to choose the site URL. The Report Center can be created in any site you choose, but you can only have one Report Center in your farm. Select a site, click OK then on the Report Center Settings page, click "Next".
8. Select which report pack to use when creating the new Report Center. Choose the default report pack or specify your own custom report pack.
    *   If you chose to specify your own report pack, click "Browse" to locate the desired Site Report Center reports. Click "Next".
    *   If you chose the default pack, click "Next".
9. Select which services to install on the server. Click "Next".

    Note: The Data Management Service and SharePoint Foundation Collector Service should be installed. For more information, refer to the Configuration Guide.

10. You will now be presented with a summary of the Nintex Analytics 2010 Settings that were entered. To change the service settings, click the "Modify" link. Click "Apply" to proceed with the installation. After clicking "Apply", a dialog box will ask you for confirmation. Click "Yes" to proceed.
11. The Configuring Nintex Analytics dialog will show the progress of the installation.

12. Once installation and configuration is complete, a Configuration Successful screen will appear. Click "Finish" to close the wizard or any of the links located under "Further Actions".
13. To install Nintex Analytics services on additional servers in a SharePoint server farm, see support article SA-NA11011 on the Nintex Connect forum.

Appendix A: Installing Nintex Analytics 2010 on additional servers

To install Nintex Analytics on additional servers, please follow the instructions below.

A.1 Running the Installer

1. Login to the server as a SharePoint administrator with sufficient privileges to deploy solutions and features. Double-click the installer file (msi) and click "Next".
2. Read the End-User License Agreement. You must select "I Agree" for the installation to proceed. Click "Next".
3. Select a location to install Nintex Analytics 2010. The default location is C:\Program Files\Nintex\Nintex Analytics 2010\ then click "Next".
4. The installer will inform you it is ready to proceed. Click "Next".
5. After a short while the installation complete screen will appear. Click the "Close" button. The Nintex Analytics Configuration Wizard will start, if not go to Start > All Programs > Nintex Analytics 2010 and click "Nintex Analytics Product Configuration Wizard".

A.2 Running the Nintex Analytics 2010 Configuration Wizard

1. Once the Nintex Analytics Configuration Wizard has loaded, click "Next" to continue.
2. A restarting services warning message will appear. Click "Yes" to continue.
3. Select "Do not disconnect from the configuration database" on the "Modify Server Settings" screen. Click "Next" to continue.
4. To change the service settings, click the "Modify" link.
5. Select which services to install on the server. Click "Next" to save the changes.

Note: The Data Management Service and SharePoint Foundation Collector Service should be installed. For more information, refer to the Configuration Guide*.*

6. The screen will refresh with the updated changes. Click "Apply" to continue.
7. A dialog box will ask you for confirmation. Click "Yes" to proceed.
8. Once installation and configuration is complete, a Configuration Successful screen will appear. Click "Finish" to close the wizard or any of the other links under "Further Actions".

Appendix B: Nintex Analytics Configuration Guide

The Nintex Analytics Configuration Guide will demonstrate how to complete your installation of Nintex Analytics and ensure data is collected and reports populated.

The Configuration Guide covers the essential requirements and then details recommendations for optimising your installation. If you find your reports are behind after installation, please refer to the document optimizing your Nintex Analytics installation.

Note: You may find that the default installation of Connector services is sufficient for your environment; however extra Nintex Analytics Connector services can be installed immediately or at a later date.

B.1 Essential Requirements

The majority of Nintex Analytics reports require SharePoint auditing to be enabled. SharePoint auditing captures the following events and can also capture the ID of the user who performed the action (privacy settings are available to hide such information):

• Check In, Check Out, Delete, Move, Copy, Update, Search, Undelete, Create and View.

B.1.1 Enable SharePoint Auditing
1. Navigate to SharePoint Central Administration.
2. Click on "Nintex Analytics Management" and select "Manage audit settings" in the General Settings section.
3. The web applications in the farm will appear.
4. Auditing can be enabled for the entire web application or for selected site collections within a web application.

B.1.2 Enable auditing for the entire web application
1. Click the title of the web application to load the Audit Settings page.
2. Choose which events you wish to capture. The more events captured, the bigger the collection of reports will be.

B.1.3 Enable auditing for a specific site collection
1. Expand the web application in which the site collection is contained and click the title of the site collection. A similar configuration page will be displayed, however it will be labelled Site Collection Audit Settings and the Site Collection name will be shown.

B.2 Configure SharePoint Foundation Collector service settings

To ensure the system is operating after installing Nintex Analytics, the SharePoint Foundation Collector service can be set to **Run continuously**.

The **Run continuously** setting will show the service is running and collecting data. Refer to the [SharePoint Foundation Collector service](#) section below for more information about the SharePoint Foundation Collector.

B.2.1 Set the SharePoint Foundation Collector service to run continuously
1. Navigate to SharePoint Central Administration.
2. Click on "Nintex Analytics Management" and select "Manage services".
3. Select "SharePoint Foundation Collector Service" and click "Settings" in the Ribbon.
4. Tick the "Run continuously" box in the Common Settings section.

Note: After you have determined that everything is running as it should, this option can be switched off. This ensures the collector only runs during your preferred hours.

B.2.2 SharePoint Audit Log Settings
One of the functions of the SharePoint Foundation Collector service (SFC) is to process SharePoint audit entries. Once the audit entries are processed, the information is saved in the Nintex Data Warehouse. If SharePoint Auditing has only been enabled for Nintex Analytics reports, the SharePoint Auditing data is no longer needed after it has been processed by the SFC.

The SharePoint log may be cleared after processing to free your SharePoint database of unwanted data. This is best completed in the early days of your installation. For more information, please refer to the inline product Help Files.

B.3 Checking for a 'heartbeat'
Once the SharePoint Foundation Collector is set to run continuously, it will begin to process the farm immediately.

B.3.1 To check for a 'heartbeat'
1. Navigate to SharePoint Central Administration.
2. Select "Nintex Analytics Management" and click "System status".
3. Locate the SharePoint Foundation Collector Service section.

Note: It should be starting to populate with topology information (indicated by the count of web applications, Sites (Site Collections), Webs (Team sites) folders, list items, files and users). The number of audit entries will continue to grow. When the page is refreshed the figures will continue to increase.

The **Collection Date** is an important point of reference. The Collection Date should always be recent - ideally, the date of the day you check it. If it is not, you may have to consider further [optimizing your environment](#).

Note: The SharePoint Foundation Collector has two types of crawl - a full crawl and an incremental crawl. The incremental crawl works continuously and picks up entries added to the SharePoint change log, which it uses to update itself. A full crawl only needs to be attempted when advised by Nintex Support.

B.4 When to expect reports to appear in the Report Center

Nintex Analytics has daily, weekly and monthly reports and they will start appearing on their next schedule period. Daily reports will appear the next day, weekly reports the start of the next week, and monthly reports the start of the next month. If you browse to any of the reports, a new execution will be dynamically created for you - this is called a new on-demand report.

B.5 Adding users into security groups

Users will need permission to access reports in the Nintex Analytics Report Center. Each individual or group of users should have the required permissions set before they can access the Nintex Analytics reports.

There are four types of permission groups:

- **Full Control:** The individual or group of users has access to all the below functions (subscription management, view and design reports), as well as the ability to set permissions for other users.
- **Subscription Management:** The individual or group of users can share report subscriptions with other people and manage subscriptions from the report listing page. This permission level should be combined with one of Design or View.
- **Design:** The individual or group of users has access to view, create and design reports using the Report Designer.
- **View Reports:** The individual or group of users has access to view the reports in the Report Center.

B.5.1 Grant user permissions

1. Log in as Administrator.
2. Navigate to the Report Center.
3. Select "Permissions" in the Nintex Analytics Ribbon.
4. Select the users to whom to grant permissions.
5. Select the permission level for the individual or group of users.

B.6 Future steps

B.6.1 Nintex Analytics collector and service architecture information

The installation steps undertaken earlier provide a basic installation of Nintex Analytics. The requisite Collector Services are all installed on the original server chosen for installation. However, in bigger farms, it is worth considering the installation of multiple collector services to ensure you have the optimum setup for your environment. The most common symptom of an environment which is not optimized is Collector collection dates which are behind (use the Central Administration "System Status" page to check).

Note: Additional services may be installed at any time and do not have to be part of the initial installation.

B.6.2 Data Management Service

The Data Management Service (DMS) controls the scheduling of reports. Usually, Nintex recommends installing this service on only one server, however bigger farms benefit from a second DMS being installed, as the DMS supports load balancing. We currently recommend that a maximum of two DMSs are installed per Nintex Analytics farm.

The DMS also supports offline scenarios, as it stores all "state" information in the configuration database, allowing the service to be offline (for short or long periods) and continue where it last stopped.

Requirements:

- The Data Management Service can be installed in any SharePoint farm member server. Application servers are preferred to web front end servers.

B.6.3 Performance Collector Service

Install the Performance Collector service for each server where performance statistics are to be collected. This service does not support load balancing as it operates on a "1 to 1" ratio i.e. one service to one server.

Requirements:

- The server must have Windows Server 2008 as its operating system.

B.6.4 SharePoint Foundation Collector service

The SharePoint Foundation Collector service (SFC) has two roles:

1. It processes SharePoint audit information and saves this information to the Nintex Analytics Data Warehouse.
2. It indexes the SharePoint farm topology.

The SFC supports load balancing and it is recommend that the service is installed on a non-web front-end server, as the service adds to memory usage (based on the size of your SharePoint site hierarchy).

Note: The term "non-web front-end" indicates servers that are not directly exposed to end users. We recommend limiting the number of SFCs based on the size of the server farm (physical servers in the SharePoint farm).Installing too many SFCs can add unnecessary load onto the SharePoint SQL server with minimal benefit.

Installing two services on a mid to large size SharePoint farm is recommended- this allows for load balancing and high availability of the service.

Where an environment has tens of thousands of site collections, increasing the number of available services will increase the speed and reduce the total time the SharePoint Foundation Collector takes to index the entire farm.

This service supports offline scenarios by storing all "state" information in the configuration database.

Requirements:

- The SharePoint Foundation Collector service can be installed in any SharePoint farm member server. Application servers are preferred to web front end servers.

B.6.5 Active Directory Collector service and SharePoint Server Collector service

The Active Directory Collector service (ADC) and SharePoint Server Collector service (SSC) collect information about users. The ADC and SSC are what we call profile services - they both perform the same job role and as such it is not recommend that both services are installed concurrently in the one Nintex Reporting farm.

The only difference between the ADC and SSC is from where they collect their respective profile information. The ADC collects information from an Active Directory source and supports multiple import sources, which can be set via the configuration screen in Central Administration. The SSC collects information from the SharePoint Server 2010 Profile Service.

SharePoint Server Collector service requirements:

1. Installation of the SharePoint Server 2010 User Profile Service.
2. The Service Application must be running in the SharePoint farm.

The SSC leverages the advanced import and merging scenarios supported by SharePoint Server 2010. When using the SSC you can take full advantage of your current SharePoint Server 2010 User Profile Service investments and import the same profile data automatically into Nintex Analytics.

Use the SSC to leverage the SharePoint Server 2010 User Profile Service ability to import from Active Directory (LDAP) and the Business Data Catalog and maintain one source of import settings which is shared between SharePoint Server 2010 and Nintex Analytics. The SharePoint Server Collector service should be used if you already have an investment in the SharePoint Server 2010 User Profile Service.

It is recommended that you do not use the SharePoint Server 2010 User Profile Service if you require profile information for accounts not currently in your SharePoint Server 2010 User Profile Service and the corporate policy does not allow you to update the scope of accounts being imported into the SharePoint Server 2010 User Profile Service. However, this is an uncommon restriction.

Neither the ADC or the SSC support load balancing, however you can install more than one of each to enable high availability in the event that one is unable to perform its function. Both services are lightweight and only actively operate for a small period during the day. You could elect to use any one of the existing servers in your farm (including a web front end server) as a standby server for these services.

Requirements:

- The ADC or SSC can be installed in any SharePoint farm member server (including web front end servers).

B.7 Installing extra Nintex Analytics Collector services

1. Login to the server where you wish to install the service. If the Nintex Analytics Configuration Wizard (NACW) is not present then you will need to install it using the Nintex Analytics 2010 MSI.
2. Ensure you have access to the same MSI you used to initially install Nintex Analytics so the appropriate version of the service you wish to install is available.
3. Run the Nintex Analytics 2010 installer on the server until it is finished.
4. Load the Nintex Analytics Configuration Wizard (NACW). This is located in the product installation location (C:\Program Files\Nintex\Nintex Analytics 2010\naconfig.exe). Alternatively you can access the NACW via All Programs.
5. The NACW will open in Modify mode. Click "Next" - you will be warned about restarting various items. Click "Yes" to proceed.
6. In the Modify Server Settings screen, ensure that the option "Do not disconnect from the existing configuration database" is selected and click "Next".
7. The Auto Discovery screen will appear, followed by the Current Nintex Analytics 2010 Configuration screen. To view the available services click "Modify".
8. A tick on the left-hand side of the service name indicates an installed service.

6.7.1 Install a service

1. Select the desired service and tick the check box. The label [Install] will be added to the service.
2. In the Services Summary section, the Current Nintex Analytics 2010 Configuration screen, should now display '1 Install, 4 Modify'.
3. Click "Apply" to confirm the change.
4. Click "Yes" when prompted. The NACW will take a few moments to commit the change.
5. Once completed, a Configuration Successful screen will appear. Click "Finish" to complete the operation.

B.8 Optimizing the system for up-to-date reports

Start with the default settings. If you find the Collection Date in the system status page falls behind the actual date, refer to optimizing your Nintex Analytics installation.