



Installation Guide



**work
flow
for
every
one**

NINTEX

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System Requirements

Operating System

Nintex Forms 2010 must be installed on Microsoft Windows Server 2008 or 2008 R2.

Browser Client

Microsoft Internet Explorer 8 or greater is recommended.

Software

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

- SQL Server 2005 SP3 or SQL Server 2008
- Nintex Workflow 2010 v2.3.9.0 or higher (if using Nintex Forms with Nintex Workflow 2010)
- Microsoft SharePoint Foundation 2010 or Microsoft SharePoint Server 2010

Refer to licensing details of SharePoint Server 2010 for Internet Sites (FIS) about external or anonymous users, when publishing forms to Nintex Live.

Optional

.Net 4.0 installed on a Web Front End Server that will host the Nintex Live Relay Service for Nintex Mobile Integration. (See [Appendix A](#) for further details).

1.0 Installing Nintex Forms 2010

Before running the Installer

To help ensure Nintex Forms 2010 installs successfully:

- **Ensure you are** logged into the server with the SharePoint Farm Installation account. This user must have appropriate permission to the Nintex Forms and Nintex Workflow database (if applicable). Note: For information on SharePoint account permissions and security settings, please see [here](#).

Install .net 4.0 (Optional)

Install .net 4.0 on a Web Front End Server that will host the Nintex Live Relay Service – Only Applicable for use with Nintex Mobile including Nintex Live integration (See Appendix A for further details).

1.1 Run the Installer

1. Double click the installer file (exe) and click “Next”.
2. Read the End-User License Agreement. You must select “I Agree” for the installation to proceed. Click “Next”.
3. Choose whether you want to add the solution to SharePoint now (recommended) or install it with SharePoint PowerShell at a later date (advanced). Click “Next”.
4. Select whether you want to install Nintex Live. This will install the Nintex Live Framework and certificates required to enable connectivity to Nintex Live.

Note: If an older version of Nintex Live is installed and the checkbox to install Nintex Live is not checked, Nintex Live will be automatically upgraded.

Note: To use Nintex Live, please refer to Nintex Licensing Information on <http://www.nintex.com/licensing> . For more information on Nintex Live configuration refer to [section 4.0](#).

5. The installer will inform you it is ready to proceed. Click “Next”.
6. A message window will display installation steps if you selected to ‘add the solution’ at step 3.
7. After a short while the “Installation Complete” message will appear. Click the “Close” button. SharePoint Central Administration will have loaded in the background.

Note: If installing Nintex Live and Nintex Forms on a multi-server farm you may receive the error message “The RPC server is unavailable” during the install process. Please refer to Appendix B for troubleshooting.

1.2 Verify Solution Packages are Deployed

1. Navigate to “Central Administration” and click on “System Settings”.
2. Verify that “nintexforms2010.wsp” and “Nintexforms2010Core.wsp” are deployed.

Note: If the status is “error”, see Appendix B for troubleshooting steps before continuing.

1.3 Importing the License

For full product functionality you must have a Nintex Forms 2010 license file issued by Nintex. The license can be either a full production license or an evaluation license. This license file will need to be imported into SharePoint Central Administration.

1. Navigate to “Central Administration” and click “Nintex Forms Management”. Click “Licensing”.
2. On the Nintex Licensing page, click the “Import” button.
3. Click the “Browse” button to locate your license file. Once it has been located, click the “Import” button.
4. The Licensing information will then be displayed. Click “OK”.

You can now proceed to configure the database for Nintex Forms 2010.

2.0 Database Configuration

2.1 Configuring the Database

1. Navigate to “Central Administration” and click “Nintex Forms Management”. Click “Manage database”.
2. This step will create a database that will store Nintex Forms configuration and application settings. Edit the settings if required, or accept the default settings and click “OK”.

3.0 Web Application Activation

3.1 Activating Nintex Forms on the Web Application

1. Navigate to “Central Administration” and click on “Application Management”
2. Click “Manage web applications” in the “Web Applications” section.
3. Select the web application to activate the Nintex Forms 2010 feature on.
i.e. SharePoint – 80
4. Click the “Manage Features” button located in the “Web Applications” Ribbon.
5. In the “Nintex Forms 2010” section, click the “Activate” button.
6. After a short delay, the page will refresh and the status will become “Active”. Click “OK”.

4.0 Nintex Live

The Nintex Live Forms feature permits form designers to make designated forms available to internet users via Nintex Live, with anonymous or secure access via third party authentication providers.

Note: The Nintex Live Framework and the certificates required to enable connectivity to Nintex Live must have been installed. If “Install Nintex Live” was not installed in section 1.1, step 5, manually install and deploy the “nintexlivecore.wsp” and import all certificates in the “Certs” folder. The “nintexlivecore.wsp” and “Certs” folder are located in the Nintex Forms 2010 installation folder.

Important: If you installed Nintex Forms 2010 on a machine that does not host SharePoint Central Administration, an additional step is necessary to operate Nintex Live. Please log on to the server hosting SharePoint Central Administration, open a SharePoint PowerShell command prompt and run the following command:

install-liveservice

This will ensure everything is ready for the Nintex Live configuration.

4.1 Establishing a Connection to Nintex Live

The Nintex Live Framework requires a connection to the internet to communicate with Nintex Live.

1. Navigate to “Central Administration” and click “Nintex Live Management”. Click “Health Checks”.
2. If a connection to Nintex Live can be established, a “Success” message is displayed in the status column.

Note: If your network requires a proxy server to access the internet, specify the server details in the “Proxy server” section. These settings are specific to the Nintex Live Framework and will be the only application allowed access to the internet.

4.2 Configuring Nintex Live Forms

1. Navigate to “Central Administration” and click “Nintex Forms Management”. Click “Live Forms settings”.
2. In the “Enable Nintex Live Forms” section, click on the “Enable” button.
3. To allow Live Forms to be submitted by anonymous users over the internet, select “Yes” in the “Allow anonymous form submissions” section. In the warning dialog, click “OK”.

Note: Allowing anonymous form submissions may require Microsoft server internet licensing.

4.3 Nintex Live Relay Service for Mobile Access

1. Navigate to “Central Administration” and click on “Application Management”. Click “Manage services on server”.
2. Locate “Nintex Forms Compatibility Relay Service” and click the “Start” link.
3. Locate “Nintex Live Relay Service” and click on the “Start” link.
4. Click “Nintex Forms Management” and then “Manage Live Mobile Access”.
5. Click “Enable” to register the farm to Nintex Live for Mobile Access.

4.4 Nintex Live Relay Service user re-assignment (optional)

From Nintex Live v.1.1.2, the managed user account which runs the Nintex Live Relay Service and the Nintex Forms Compatibility Relay Service can be changed.

1. Navigate to “Central Administration” and click on “Security”. Click “Configure service accounts”.
2. In the first drop down menu, select “Windows Service – Nintex Live Relay Service” or “Windows Service – Nintex Forms Compatibility Relay Service”
3. Select the appropriate user within the “Select an account for this component” drop down menu and click “Ok”.

Note: Ensure that the managed user which runs the service has appropriate access to the Nintex Forms and Nintex Workflow Databases, and access to the SharePoint Lists and Web Applications that may be used by the Live service. The managed user must be in the Farm Administration Group on the farm.

5.0 Activate Features

5.1 Site Collection Activation

1. To activate Nintex Forms 2010 features on a site collection, navigate to the Top Site level home page and click “Site Actions” > “Site Settings”.
2. In the “Site Collection Administration” section, click “Site collection features”.
3. In the “Nintex Forms 2010 Prerequisite Feature” section, click the “Activate” button.
4. After a short delay, the page will refresh and the status will become “Active”.
5. To use Nintex Forms 2010 to design SharePoint list forms, click “Activate” in the “Nintex Forms 2010 for SharePoint List Forms” section.
6. To allow form designers to publish forms to Nintex Live, click “Activate” in the “Nintex Live Forms” section.
7. To use Nintex Forms 2010 to design start forms and task forms in Nintex Workflow 2010 on sites within this site collection, click “Activate” in the “Nintex Forms 2010 for Nintex Workflow” section.

Note: An error message will be displayed if prerequisite software is not detected. Please ensure that all software requirements are installed and configured.

Nintex Forms 2010 is now ready for use.

Appendix A

What is the Nintex Live Relay Service

If you are using the Nintex Mobile product and require communication to be sent through Nintex Live, Nintex Forms v1.3 and above ships with additional components to interoperate with Nintex Mobile and Nintex Live. These additional components, the Nintex Live Relay Service and the Nintex Forms Compatibility Relay Service, must run on a server that has .net 4.0 installed.

Typically, the Nintex Forms 2010 installer should deploy these components automatically to all servers in your farm that have .net 4.0 installed.

Appendix B

Troubleshooting Installation issues

The installation has completed but with errors stating “The RPC Server is unavailable”

If a server within the farm is not available due to firewall or security restrictions, the following error may be encountered when installing Nintex Forms 2010; “The RPC Server is unavailable”.

This may lead to a failure in the deployment of one or more of the Nintex SharePoint solutions and the failure in deploying the Nintex Live Relay Service and the Nintex Forms Compatibility Relay Service.

To rectify this issue, perform Part A. You may also need to perform Part B.

Requirements:

- The user executing the script will need appropriate permissions to SharePoint and Windows
- The user will need access to SharePoint Central Administration
- Run the script in SharePoint Management Shell
- The Nintex Live Core Solution must be installed via the appropriate Nintex installation executable

Part A - Ensure all Solutions are deployed and configured

The following process should be performed **once** in the farm if there were errors when running the Nintex Forms 2010 installer executable.

1. For each server in your farm, stop the Nintex Live Relay Service and Nintex Forms Compatibility Relay Service if they exist and are started.
 - a. Navigate to “Central Administration”.
 - b. In the “System Settings” section, click on “Manage services on server”.
 - c. Locate “Nintex Live Relay Service” and click the “Stop” link.

- d. Locate “Nintex Forms Compatibility Relay Service” and click the “Stop” link.
- e. Repeat steps c and d for all servers in your farm by clicking the server dropdown in the top right hand corner of the Central Administration “Manage services on server” page.

Note: If you are unable to locate Nintex Live Relay Service and the Nintex Forms Compatibility Relay Service in the services list, navigate to Windows administration tools and click on “Services”. Double-check that the Windows Service exists (Nintex Live Relay Service/ Nintex Forms Compatibility Relay Service) and stop it if it is started.

2. Perform an IISReset and restart the “SharePoint Timer Service” on each server in your farm.
3. Re-deploy the Nintex Solutions if any of the solutions encountered errors on the initial deployment.
 - a. Open SharePoint Central Administration.
 - b. Navigate to “Services” category, click on “Manage Farm Solutions”.
 - c. After executing the Nintex Forms Installer, there should be 3 Solutions installed:
 - i. NintexForms2010Core.wsp
 - ii. NintexForms2010.wsp
 - iii. NintexLiveCore.wsp
 - d. If any of the above solutions are in an ‘error’ state, click on a given solution and redeploy it. If there is a dll/file lock issue, see [this section](#).
4. If the NintexForms2010.wsp or NintexForms2010Core.wsp solutions failed to deploy on the initial deployment, run the following script by opening SharePoint Management Shell on the Central Administration server.

Note: Alternatively, you may also run this script in Windows PowerShell. If you do, you need to add the following line to the script.

```
Add-PSSnapin 'Microsoft.SharePoint.PowerShell'
```

```
Upgrade-NFService
```

5. If the Nintex Live Solution failed to deploy on the initial deployment, run the following script by opening SharePoint Management Shell.

Note: Alternatively, you may also run this script in Windows PowerShell. If you do, you need to add the following line to the script.

```
Add-PSSnapin 'Microsoft.SharePoint.PowerShell'
```

```
Install-LiveService
```

Part B – Deploy services for Nintex Mobile and Nintex Live integration (Optional)

Only perform the below steps if you require Nintex Mobile requests to be relayed through Nintex Live.

Perform the below steps on a single server in your farm that you’ve designated to host the Live Relay Service, typically an Application Server. If you require load balancing of the Live Relay Service, repeat these steps for one or more servers.

1. Perform all steps in Part A (where applicable).

2. Open Services on the server to view the local Windows Services on the server.
 - a. If the 'Nintex Live Relay Service' Windows Service and the 'Nintex Forms Compatibility Relay Service' Windows Service do not exist, run the following script within the SharePoint Management Shell.

Note: Alternatively, you may also run this script in Windows PowerShell. If you do, you need to add the following line to the script.

```
Add-PSSnapin 'Microsoft.SharePoint.PowerShell'

$path =
[Microsoft.SharePoint.Utilities.SPUtility]::GetVersionedGenericSetupPath("bin\NintexLive\Nintex.Live.RelayService.exe",14)
$serviceName = "Nintex Live Relay Service"
New-Service -Name $serviceName -BinaryPathName $path

$path =
[Microsoft.SharePoint.Utilities.SPUtility]::GetVersionedGenericSetupPath("bin\NintexForms\Nintex.Forms.Mobile.Compatibility.RelayService.exe",14)
$serviceName = "Nintex Forms Compatibility Relay Service"
New-Service -Name $serviceName -BinaryPathName $path
```

- b. Once the above script is executed, check that the two services were created.
3. Start the services in Central Administration.
 - a. Click on "Application Management" and then "Manage services on server".
 - a. Locate "Nintex Live Relay Service" and click the "Start" link.
 - b. Locate "Nintex Forms Compatibility Relay Service" and click the "Start" link.

Note: If the "Nintex Live Relay Service" or the "Nintex Forms Compatibility Relay Service" are in a "starting" status (with no start/stop link) for a prolonged period, then complete the following steps in the following section.

The "Nintex Live Relay Service" is stuck on 'starting' in Central Administration.

A timer job failed to start the service. Delete the job and stop the service:

1. To manually stop the service instance on a specific server in your farm, run the following powershell from the SP powershell console:

```
#List all instances of the relay service
$s = Get-SPServiceInstance | where-object { $_.Name -eq "NintexLiveRelayServiceInstance"
}
$s
```

2. Next, stop a specific instance with the below command:

```
Stop-SPServiceInstance -Identity <A specific instance ID>
```

3. If the above command fails with an error:

Stop-SPServiceInstance : An object of the type Microsoft.SharePoint.Administration.SPServiceInstanceJobDefinition named "job-service-instance-2dc2524e-46b7-43f6-a4b3-15689e014b54" already exists under the parent Microsoft.SharePoint.Administration.SPTimerService named "SPTimerV4". Rename your object or delete the existing object.

There is a pending timer job that must be removed. To do so, run:

```
$job = Get-SPTimerJob | where { $_.Name -eq "<Job name shown in error message>" }  
$job.Delete()
```

Now, rerun the stop command in step 2.

4. Restart the timer service on the server.
5. Close and open Central Administration and go to 'Services on Server'
 - a. Click the server drop down and select the server in question.
 - b. Click start on Nintex Live Relay Service.

The NintexForms2010Core.wsp won't deploy/retract, due to a dll/exe locking issue.

A process is locking a dll that is deployed with NintexForms2010Core.wsp. The process will need to be terminated or recycled.

An example message shown in the solution deployment page within Central Administration is:

Some of the files failed to copy during deployment of the solution.

Last Operation Details: ntx-tom-1 : Error: The copying of this file failed:
bin\NintexLive\Nintex.Forms.Mobile.Compatibility.LiveRelay.dll.

The process cannot access the file 'C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\14\bin\NintexLive\Nintex.Forms.Mobile.Compatibility.LiveRelay.dll' because it is being used by another process.

1. For each server in your farm, stop the Nintex Live Relay Service and Nintex Forms Compatibility Relay Service if they exist and are started.
 - a. Navigate to "Central Administration".
 - b. In the "System Settings" section, click on "Manage services on server".
 - c. Locate "Nintex Live Relay Service" and click the "Stop" link.
 - d. Locate "Nintex Forms Compatibility Relay Service" and click the "Stop" link.
 - e. Repeat steps c and d for all servers in your farm by clicking the server dropdown in the top right hand corner of the CA "Manage services on server" page.

Alternatively, stop the "Nintex Forms Compatibility Relay Service" and "Nintex Live Relay Service" Windows Services on the server.

2. Restart the timer service on any server that is listed where the deployment/retraction failed.
 - a. To discover which files/dlls are locked, within Central Administration,
 - b. Navigate to the "Services" category, and click on "Manage Farm Solutions".

- c. Click on the NintexForms2010Core.wsp solution. The reason for the failure will be listed as well as which servers experienced the issue.
3. Restart IIS on any server that is listed where the deployment/retraction failed.
4. Retry the deployment or retraction.
 - a. If it still fails with a dll locking issue, you can forcibly remove the Nintex Forms dlls from the GAC with a tool such as GacUtil.

The Nintex Forms Installer completed but threw the following error:

Failed to activate web application feature. Error: Failed to open a connection to the Nintex Workflow configuration database..
Stack trace: at Nintex.Workflow.Administration.ConfigurationDatabase.OpenConfigDataBase() at
Nintex.Workflow.Administration.Database.ExecuteReader(SqlCommand command, CommandBehavior behavior) at
Nintex.Workflow.Administration.ContentDatabaseCollection..ctor() at
Nintex.Workflow.Administration.ConfigurationDatabase.get_ContentDatabases() at
Nintex.Forms.SharePoint.NintexWorkflowMethods.UpdateNintexWorkflowStoredProcedure() at
Nintex.Forms.SharePoint.NWWrapper.UpdateNintexWorkflowStoredProcedure() at
Nintex.Forms.SharePoint.EventReceivers.WebApplicationFeatureEventReceiver.FeatureActivated(SPFeatureReceiverProperties
properties).

This error will occur when the user who ran the installer does not have the appropriate permissions to the Nintex Workflow database.

1. Open Central Administration and navigate to “Application Management”->Manage Web Applications.
2. Select a web application and click on “Manage Features”
3. Activate the Nintex Forms feature.