Nintex Forms 2013 Installation Guide

Nintex Workflow for Everyone

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System Requirements

Operating System

Nintex Forms 2013 must be installed on Microsoft Windows Server 2008 R2 or Windows Server 2012.

Browser Client

Microsoft Internet Explorer 8.x although Microsoft Internet Explorer 9 or 10 is recommended.

Software

Nintex Forms 2013 requires that the following software is installed and correctly configured:

• SQL Server 2008 R2 SP1 or SQL Server 2012

- Nintex Workflow 2013 (Refer to the [Release Notes](#) for required version number) if using Nintex Forms with Nintex Workflow 2013

- Microsoft SharePoint Foundation 2013 or Microsoft SharePoint Server 2013

Refer to licensing details of SharePoint Server 2013 for Internet Sites (FIS) about external or anonymous users, when publishing forms to Nintex Live.

1. Installing Nintex Forms 2013

Before running the Installer

To help ensure Nintex Forms 2013 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.

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. 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.

4. 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".

Note: Nintex Forms 2013 does not create an installation folder in the Program Files directory. Choosing to export the solution provides access to the various solution files for manual deployment.

5. An Install status message will appear if you selected to 'add the solution' at step 4. After a short while the "Installation Complete" screen 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 A for troubleshooting.

1.2 Deploy the Solution Package

1. Click "Manage farm solutions" in the "Farm Management" section. The solution "nintexforms2013.wsp" should be visible.

2. Click the "nintexforms2013.wsp" link and then click the "Deploy Solution" link in the toolbar.

3. Ensure that "All content Web applications" is selected in the "Deploy To?" section. Click "OK".

4. After a short interval, you will be returned to the "Solution Management" page. Nintex Forms 2013 ("nintexforms2013.wsp") should now appear as "Deployed".

1.3 Installing Nintex Forms 2013 Backwards Compatibility Feature (optional)

1. Navigate to "Central Administration" and click on "System Settings".

2. Click "Manage farm solutions" in the "Farm Management" section. The solution "nintexforms2013backwardscompatibilityui.wsp" should be visible.

3. Click the "nintexforms2013backwardscompatibilityui.wsp" link and then click the "Deploy Solution" link in the toolbar.

4. Ensure that "All content Web applications" is selected in the "Deploy To?" section. Click "OK".

5. After a short interval, you will be returned to the "Solution Management" page. "Nintexforms2013backwardscompatibilityui.wsp" should now appear as "Deployed".

1.4 Importing the License

For full product functionality you must have a Nintex Forms 2013 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 2013.

2. Database Configuration

2.1 Configuring the Database

1. Navigate to "Central Administration" and click "Nintex Forms Management". Click "Manage database". This step will create a database that will store Nintex Forms configuration and application settings.

2. Edit the settings if required, or accept the default settings and click "OK".

3. 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 2013 feature on.
    e.g. SharePoint – 80

4. Click the "Manage Features" button located in the "Web Applications" Ribbon.

5. In the "Nintex Forms" section, click the "Activate" button.

6. After a short delay, the page will refresh and the status will become "Active". Click "OK".

4. 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 2013 installation folder.

Important: If you installed Nintex Forms 2013 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 on "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 Live Relay Service" and click on the "Start" link.

3. Click "Nintex Forms Management" and then "Manage Live Mobile Access".

4. Click "Enable" to register the farm to Nintex Live for Mobile Access.

Note: If your SharePoint server(s) are behind a firewall and/or the network has a proxy server configured, see <u>Appendix B.</u>

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

From Nintex Live v.3.0.3.1, the managed user account that runs the Nintex Live 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".

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. Activate Features

5.1 Site Collection Activation

1. To activate Nintex Forms 2013 features on a site collection, navigate to the Top Site level home page and click on the Settings Icon, ⚙, in the top right-hand corner. Select "Site Settings".

2. In the "Site Collection Administration" section, click "Site collection features".

3. In the "Nintex Forms 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 2013 to design SharePoint list forms, click "Activate" in the "Nintex Forms 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 2013 to design start forms and task forms in Nintex Workflow 2013 on sites within this site collection, click "Activate" in the "Nintex Forms 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 2013 is now ready for use.

Appendix A

Nintex Live Relay Service - Installing Nintex Live on a multi-server farm

Installing the Nintex Forms 2013 Solution and the Nintex Live Core Solution from SharePoint may fail to remotely install the Nintex Live Relay Service on all servers within the farm. This may happen if installing on a multi-server farm.

If a Server within the farm is not available due to firewall or security restrictions, the following error may be encountered "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 upgrading or installing the Nintex Live Relay Service.

The following process should be followed to install or upgrade the Service and SharePoint solutions on each individual Server manually.

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

This procedure will:
- Stop and restart the Nintex Live Relay Service if already installed and started
- Attempt to install the Nintex Live Relay Services on the current server if required
- Deploy the Nintex Forms, Nintex Workflow or Nintex Live solutions to SharePoint
- Perform an IISReset on all servers
- Install the Nintex Live Service

To run the PowerShell script:
1. For each server, stop the Nintex Live Relay Service if it exists and it is 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.

Note: If you are unable to locate Nintex Live 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) and stop it if it is started.

2. Perform an IISReset and restart the "SharePoint Timer Service" on each Server.
3. Re-deploy the Nintex Solutions if any of the solutions encountered errors on the initial deployment.
4. If the Nintex Forms Solution 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

6. For each server, if the Windows Service does not exist, 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'

```
$path =
[Microsoft.SharePoint.Utilities.SPUtility]::GetVersionedGenericSetupPath("bin\NintexLive\Nintex.Live.RelayService.exe",15)
$serviceName = "Nintex Live Relay Service"
New-Service -Name $serviceName -BinaryPathName $path
```

7. If the Service was stopped in step 1, you will need to restart the Service via Central Administration.
   a. Click on "Application Management" and then "Manage services on server".
   b. Locate "Nintex Live Relay Service" and click the "Start" link.

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

8. Click on "Monitoring" and then "Review job definitions".

9. Click on job "Provisioning Nintex Live Relay Service on [SERVERNAME]" and delete the service.

10. Run the following script in PowerShell

```
#Uninstall and InstallSharePoint Service

Add-Type -AssemblyName "Nintex.Live.SharePoint, Version=1.0.0.0, Culture=neutral,
PublicKeyToken=c52d764dcf7ec883" -ErrorAction:SilentlyContinue | out-null

[Nintex.Live.SharePoint.WindowsServices.NintexLiveRelayInstaller]::UnInstallInstance("SERVERNAMEHERE ")

[Nintex.Live.SharePoint.WindowsServices.NintexLiveRelayInstaller]::InstallInstance("SERVERNAMEHERE ")
```

11. Then re-run step 7 above, on page 9.

Appendix B

Firewall configuration for Nintex Live

If you are making use of Nintex Mobile integration via Nintex Live, and have a firewall in place, the Nintex Live Relay Service requires the following ports to be accessible:

- 9351/HTTP
- 80/HTTP
- 443/HTTP

Proxy Server configuration for Nintex Live (Optional)

If you have a proxy server in your environment, the Nintex Live Relay Service communicates with the following endpoints. You may need to add these URLs as accessible in your proxy software.

https://live.nintex.com and https://liveservices.nintex.com

https://nintexlive.blob.core.windows.net/serviceicon

https://nintexrelay.servicebus.windows.net/