

## System Requirements

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### Operating System

Nintex Workflow 2007 must be installed on Microsoft Windows Server 2003 or 2008.

### Browser Client

Microsoft Internet Explorer 6.x although Microsoft Internet Explorer 7 or greater is recommended.

### Software

Nintex Workflow 2007 requires that the following software is installed and correctly configured:

- Microsoft Windows SharePoint Services 3.0 or Microsoft Office SharePoint Server 2007
- Microsoft .NET Framework 3.5
- Windows Server 2003 or 2008
- SQL Server 2000, 2005 or 2008

*Note: Nintex Workflow 2007 cannot connect to a Windows Internal Database that is used by standalone SharePoint installations.*

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# 1. Installing Nintex Workflow 2007

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## 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”.

*Note: See Appendix A if you have User Access Control (UAC) enabled.*

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 Workflow 2007. The default location is “C:\Program Files\Nintex\Nintex Workflow 2007\” then click “Next”.
4. Choose whether you want to add the solution to SharePoint now (recommended) or install it with stsadm at a later date (advanced).
5. Select whether you want to install Nintex Live. This will install the Nintex Live Connector which is required to enable connectivity to Nintex Live. Click “Next”.

*Note: To use Nintex Live, please refer to Nintex Licensing Information on <http://www.nintex.com/licensing>*

6. The installer will inform you it is ready to proceed. Click “Next”.
7. If you selected to add the solution now, you will see command prompt windows appear and disappear. After a short while the “Installation complete” screen will appear. Click the “Close” button. SharePoint Central Administration will have loaded in the background.

## 1.2 Deploy the Solution Package

The solution “nintexworkflow2007.wsp” should be visible. You will also see an entry for “nintexworkflow2007enterprisefeatures.wsp” however you should only deploy this if you have been licensed for the Enterprise version.

1. Click the “nintexworkflow2007.wsp” link and then click the “Deploy Solution” link in the tool bar.
2. In the “Deploy To?” section, ensure that “All content Web applications” is selected, then click the “OK” button.
3. After a short interval, you will be returned to the “Solutions Management” page. Nintex Workflow 2007 should now appear as “Deployed”.

## 1.3 Installing Nintex Workflow 2007 Enterprise Features (optional extra)

1. In Central Administration, click “Operations”.
2. In “Global Configuration”, click “Solution Management”.
3. Click the “nintexworkflow2007enterprisefeatures.wsp” link and then click “Deploy Solution”.
4. In the “Deploy To?” section, ensure that “All content Web applications” is selected then click the “OK” button.
5. After a short interval, you will be returned to the “Solutions Management” page.

6. NintexWorkflow2007EnterpriseFeatures.wsp should now appear as Deployed. Repeat steps 2-3 and deploy "NintexWorkflow2007EnterpriseFeatures.wsp" again, and select your Central Administration web application as the 'Deploy To' location.

*Note: This is required to run the administration reports via SharePoint Central Administration.*

## 1.4 Importing the License

For full product functionality you must have a license file provided by Nintex, be it a full production license or an evaluation license. You will then need to import your license file into SharePoint Central Administration.

1. In Central Administration, click the "Application Management" tab. In the "Nintex Workflow Management" section, click "Licensing".
2. On the Nintex Licensing page, click the "Import" button.
3. Click the browse button to locate your license file and once you have located it, click the "Import" button.
4. The licensing information will then be displayed.

You can now proceed to configure databases for Nintex Workflow 2007.

## 2. Database Configuration

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### 2.1 Configuring the Database

1. In Central Administration, click the "Application Management" tab.
2. In the section "Nintex Workflow Management", click "Database Setup".
3. Click the "Create" button under "Configuration Database".
4. Enter the name of your database server.

*Note: The name will default to the default SharePoint database server.*

5. Enter a name for the database.

*Note: Nintex Workflow 2007 can use multiple databases, one for configuration and others for content. By default the configuration database is also made the content database. You can add more databases optionally.*

6. Click "OK".

### 2.2 Adding a Content Database (Optional)

1. In the "Content Database" section, click on the "Add content database" link.
2. To add a content database, click the "Connect to existing database" check-box and click "OK".

## 3. Configure Nintex Workflow 2007 server settings

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### 3.1 Web Application Activation

1. Click the “Application Management” tab then click on “Web Application Activation” in the “Nintex Workflow Management” section.
2. The default web application name should be chosen automatically. Click the “Activate” button.

### 3.2 Enable Nintex Workflow 2007 Workflow Actions

1. Click the “Application Management” tab then click on “Manage Allowed Actions” in the “Nintex Workflow Management” section.
2. Check the boxes of the actions you want to appear in the Workflow Designer and then click “OK”.

### 3.3 Configure Email Settings

1. Click the “Application Management” tab then click on “Global Settings” in the “Nintex Workflow Management” section.
2. Fill in the appropriate details for your environment and click the “OK” button.

### 3.4 Enable and Configure LazyApproval™ Settings (optional)

1. Click the “Application Management” tab then click on “LazyApproval™ Settings” in the “Nintex Workflow Management” section.

*Note: If you see the link “Configure server incoming mail settings” then those settings are not configured for SharePoint. Please configure them according to your SharePoint configuration documentation. Return to this page after completing your configuration. If those settings are configured, you will instead see the link “Enable/ Disable LazyApproval™”.*

2. Click on “Enable/ Disable LazyApproval™”.
3. Now select the “Enabled” option. You will be asked for an “alias” which is the name that will be used in the email address that sends the notifications and accepts the LazyApproval™ replies. Press the “OK” button.
4. A list of allowed words will appear. These are those that will be recognized by the LazyApproval™ process. You can add or remove terms at your discretion. Click the “OK” button when you are finished.

## 4. Nintex Live (optional)

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The Nintex Live for Nintex Workflow feature allows users to add web services from the Nintex Live Catalog to the Nintex Workflow actions toolbox.

*Note: The Nintex Live Connector is required to enable connectivity to Nintex Live and must be installed. If “Install Nintex Live” was not installed in section 1.1, step 5, manually install and deploy the “nintexworkflow2007liveconnector1.wsp”. The “nintexworkflow2007liveconnector” is located in the Nintex Workflow 2007 installation folder.*

### 4.1 Deploy the Solution Package

1. Navigate to Central Administration and select “Operations”.
2. In the “Global Configuration” section, click “Solution Management”.
3. Click the “nintexworkflow2007liveconnector.wsp” link and then click “Deploy Solution” in the toolbar.
4. The Nintex Live Connector will be deployed globally. Click the “OK” button on the “Deploy Solution” page.
5. After a short interval, you will be returned to the “Solutions Management” page. Nintex Live Connector 2007 should now appear as “Deployed”.

### 4.2 Enabling and Establishing a Connection to Nintex Live

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

1. Navigate to “Central Administration” and select “Application Management”.
2. In the “Nintex Workflow Management” section, click on “Live Settings”.
3. In the “Enable Nintex Live for Nintex Workflow” section, click on “Enable”.
4. In the “Nintex Live” section, click on “Test Connection”.
5. If a connection to Nintex Live can be established, a “Connection successful” message is displayed below the “Test Connection” button.
6. Click “OK”.

*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 Connector and it will be the only application allowed access to the internet.*

## 5. Activate Features

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### 5.1 Site Collection Activation

1. Navigate to your Top Site level home page and click “Site Actions > Site Settings”.
2. In the right column, “Site Collection Administration”, click “Site Collection Features”.
3. In the Nintex Workflow 2007 section, click the “Activate” button.
4. After a short delay, the page will refresh and the status will become “Active”.
5. To use the Nintex Workflow web parts on team sites in this site collection, click “Activate” in the “Nintex Workflow 2007 Web Parts” section.
6. To provide support infrastructure for Nintex Live connections, click "Activate" in the "Nintex Workflow Live Infrastructure" section.

*Note: This must be activated prior to activating the Nintex Live Catalog feature.*

7. To use the Nintex Live Catalog on sites in this site collection, click "Activate" in the "Nintex Live Catalog" section.

It is now possible to activate Nintex Workflow 2007 features in team sites.

### 5.2 Team Site Activation

Enabling Nintex Workflow 2007 for a team site involves the same process as enabling it for a site collection except step 2.

1. From the Top Site level home page, click “Site Actions > Site Settings”
2. In the right column, “Site Administration”, click “Site Features”.
3. In the Nintex Workflow 2007 section, click the “Activate” button.
4. After a short delay, the page will refresh and the status will become “Active”.

It is now possible to design and interact with Nintex Workflow 2007. For more information, please refer to the product help files, accessible from any page that uses Nintex Workflow 2007 functionality.

### 5.3 Team Site Activation of Nintex Workflow 2007 Enterprise Features (optional extra)

Enabling Nintex Workflow 2007 Enterprise features for a team site involves the same process as activating the main feature.

1. From the Top Site level home page, click “Site Actions > Site Settings”.
2. In the right column, “Site Administration”, click “Site Features”.
3. In the Nintex Workflow 2007 section, click the “Activate” button.
4. In the Nintex Workflow 2007 Enterprise Reporting section, click the “Activate” button.

It is now possible to design and interact with Nintex Workflow 2007. For more information, please refer to the product help files, accessible from any page that uses Nintex Workflow 2007 functionality.



## Appendix A: Notes on User Access Control (UAC)

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If the environment has UAC enabled the msi must be run with administrator privileges.

1. Click the Start menu and right-click on the Command Prompt option. Choose "Run as administrator".
2. If a warning dialog appears, click "Continue" to open the Windows Command Processor.
3. Type in the command **msiexec /i c:\nintexworkflow2007.msi**.

*Note: Replace the path with the location where you downloaded the msi file to.*