

Installation Guide

System Requirements

Operating System

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

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.
- Windows Server 2003 or 2008.

 SQL Server 2000, 2005 or 2008.
 PLEASE 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™

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

	Welcome to the Installation Wizard
The installer will guide you through the steps required to install computer.	Nintex Workflow 2007 on your
WARNING: This computer program is protected by copyright L Unauthorized duplication or distribution of this program, or any or criminal penalties, and will be prosecuted to the maximum ex	portion of it, may result in severe civil
Cancel	< Back Next >

2. Read the End-User License Agreement. You must select "I Agree" for the installation to proceed. Click "Next".

	2007°	License Ag	reement		
	Please take a moment to read the license agreement now. If you accept the terms below, click "I gree", then "Next". Otherwise click "Cancel".				
END USER LICENSE AGREEMENT FOR NINTEX SOFTWARE					
INFORMATION 2007 FOR WIRAGWS SHAFPOINT Services INFORTANT-READ CAREFULLY: This End-User License Agreement ("EULA") is a legal agreement between you (either an individual person or a single legal entity, who will be referred to in this EULA as "You") and NINTEX software technology that displays, accompanies or is otherwise associated with this EULA in cluding					
O I Do Not Agree	I Agree				
	Cancel	< <u>B</u> ack	<u>N</u> ext >		

3. Select a location to install Nintex Workflow 2007. The default location is C:\Program Files\Nintex\Nintex Workflow 2007\ then click "Next".

	Select i	nstallation folder			
The installer will install Nintex Workflow 2007 to the following folder. To install in this folder, click "Next". To install to a different folder, enter it below or click "Browse".					
Eolder: C: VProgram Files (Nintex Minitex Workflow 2007)		Biowse Disk Cost			
Cancel	< <u>B</u> ack	<u>N</u> ext >			

4. Choose whether you want to add the solution to SharePoint now (recommended) or install it with stsadm at a later date (advanced).

	Confirm installation			
already deployed (you are updaing), Internet Informatio on each SharePoint web front end server. If you chooss stadm.exe. Do you want to add the solution to SharePo ? Yes, add the solution to SharePoint now. Updatin	The Nintex Workflow 2007 solution can be added to SharePoint automatically. If the solution is already deployed (you are updating), Internet Information Services (IIS) will be restarted automatically on each SharePoint web front and server. If you choose to add the solution later, you can do so with stadm.exe. Do you want to add the solution to SharePoint now?			
	C No, do not add the solution to SharePoint. I will deploy it manually later.			
Cancel	<u>A Back</u>			

5. The installer will inform you it is ready to proceed. Click "Next"

WORKFLOW2007	Confirm installation
The installer is ready to install Nintex Workflow 2007 on y Click "Next" to start the installation.	vour computer.
Cancel	< Back Next >

6. 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 Installing Nintex Workflow 2007™ (cont)

1.2 Deploy the solution package

1. 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.

olution Management		
nis page has a list of the Solutions in the farm.		
his page has a list of the Solutions in the family		
Name	Status	Deployed To
	Status Not Deployed	Deployed To None

2. Click the "nintexworkflow2007.wsp" link and then click the "Deploy Solution" link in the tool bar.

entral Administration > Operations > Sol Solution Properties	ution Management > Solution Properties
Deploy Solution Remove Solution Ba	ack to Solutions
Name:	nintexworkflow2007.wsp
Туре:	Core Solution
Contains Web Application Resource:	Yes
Contains Global Assembly:	Yes
Contains Code Access Security Policy:	No
Deployment Server Type:	Front-end Web server
Deployment Status:	Not Deployed
Deployed To:	None
	No operation has been performed on the solution.

3. In the "Deploy To?" Section, ensure that "All content Web applications" is selected then click the "OK" button (button not shown).

Deploy Solution		
Use this page to deploy the solution.		
Solution Information Information on the solution you have chosen to deploy.	Name: Locale: Deployed To: Deployment Status:	nintexworkflow2007.wsp 0 None
Deploy When? A timer job is created to deploy this solution. Please specify the time at which you want this solution to be deployed.	Choose when to deploy to Now C At a specified time 2/12/2007	
Deploy To? The solution contains Web application scoped resources and should be deployed to specific Web applications. Please choose the Web application where you want the solution to be deployed.	assembly cache. This v	

4. After a short interval, you will be returned to the "Solutions Management" page. Nintex Workflow 2007™ should now appear as "Deployed".



1 Installing Nintex Workflow 2007™ (cont)

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

1. In Central Administration, select Operations then Solution Management.

ientral Administration > Operations > Solution Management Solution Management		
This page has a list of the Solutions in the farm.		
Name	Status	Deployed To
nintexworkflow2007.wsp	Deployed	http://james-vpc1/
nintexworkflow2007enterprisefeatures.wsp	Not Deployed	None

2. Click the "nintexworkflow2007enterprisefeatures.wsp" link and then click "Deploy Solution".

Central Administration > Operations > Solu Solution Properties	ution Management > Solution Properties
Deploy Solution Remove Solution Ba	ck to Solutions
Name:	nintexworkflow2007enterprisefeatures.wsp
Type:	Core Solution
Contains Web Application Resource:	Yes
Contains Global Assembly:	Yes
Contains Code Access Security Policy:	No
Deployment Server Type:	Front-end Web server
Deployment Status:	Not Deployed
Deployed To:	None
Last Operation Result:	No operation has been performed on the solution.

3. In the "Deploy To?" section, ensure that "All content Web applications" is selected then click the "OK" button (button not shown).

Central Administration > Operations > Solution Management > Solution Properties > Deploy Solution Deploy Solution				
Use this page to deploy the solution.				
Solution Information Information on the solution you have chosen to deploy.	Name: nintexworkflow2007enterprisefeatures.wsp Locale: 0 Deployed To: None Deployment Status:			
Deploy When? A timer job is created to deploy this solution. Please specify the time at which you want this solution to be deployed.	Choose when to deploy the solution: Now At a specified time: 10/30/2007 III 3 PM M 00 M			
Deploy To? The solution contains Web application scoped resources and should be deployed to specific Web applications. Please choose the Web application where you want the solution to be deployed.	Choose a Web application to deploy this solution: All content Web applications 💌 Warning: Deploying this solution will place assemblies in the global assembly cache. This will grant the solution assemblies full trust. Do not proceed unless you trust the solution provider.			

4. After a short interval, you will be returned to the "Solutions Management" page. NintexWorkflow2007EnterpriseFeatures.wsp should now appear as Deployed. Repeat the steps to deploy "NintexWorkflow2007EnterpriseFeatures.wsp" again, and select your Central Administration web application as the 'Deploy To' location.

Deploy To?
The solution contains Web application scoped resources and should be deployed to specific Web
applications. Please choose the Web application where you want the solution to be deployed.

Choose a Web application to deploy this solution: http://james-vpc1:12345/ 💌

Warning: Deploying this solution will place assemblies in the global assembly cache. This will grant the solution assemblies full trust. Do not proceed unless you trust the solution provider.

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



1 Installing Nintex Workflow 2007™ (cont)

1.4 Importing the license

1. 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. In Central Administration, click the "Application Management" tab. Then, in the Nintex Workflow 2007 Server Management section, click the link "Licensing".

Licensing	

2. On the Nintex Licensing page, click the "Import" button.

Nintex Licensing	
Import	Invalid license.

3. Click the browse button to locate your license file and once you have located it, click the "Import" button.

Nintex	Licensing
Filename:	texWorkflow2007Trial.nlf Browse Click 'Browse' to locate a Nintex License file(.nlf) to upload.
	Import Cancel

4. The Licensing information will then be displayed.

Import	Export
	NINTEX
	Nintex License
	Nintex Workflow 2007
	Issued by: Cameron McConnell Date issued: 10/31/2007 Issued to: James Tyzack (Nintex)
	James-VPC1 (Production) Registered No software assurance purchased. Contact sales@nintex.com to purchase software assurance.
	Nintex Workflow 2007 (10818) JAMES-VPC1

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





2 Database configuration

2.1 Configuration database

1. In Central Administration, click the "Application Management" tab.

- 2. In the section "Nintex Workflow Management", click "Nintex Database Setup".
 - Nintex Workflow Management

 Licensing

 Database Setup

 Web Application activation

 Manage allowed actions

 Global settings

 LazyApproval settings

 Message templates

3. Click the "Create" button under "Configuration Database".

	Manage Nintex Workflow database settings
View All Site Content Central Administration • Operations • Application Management © Recycle Bin	Use this page to manage the Nintex Workflow database settings. Configuration Database Note: You must reset IIS for these changes to take effect No configuration database have been set up. Create
	Content Database listing No content databases have been set up

4. Enter the name of your database server (note, it defaults to the default SharePoint database server).

Add configuration database

Use this page to create a new Nintex Workflow configuration database.

Warning: this page is not encrypted for secure communication. User names, passwords, and any other information will be sent in clear text. For more information, contact your administrator.

Database Name and Authentication	Database Server
Note: Nintex Workflow 2007 cannot connect to a Windows Internal Database that is used by stand-alone SharePoint installations.	MYDATABASESERVER
	Database Name
Use of Windows authentication is strongly recommended. To use SQL authentication, specify the credentials which will be used to connect to the database.	NW2007DB
	\square Connect to existing database
	Database authentication
	• Windows authentication (recommended)
	O SQL authentication
	Account
	Password
	OK Cancel

5. Enter a name for the database. Please note, NW2007 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.



Installation Guide

2 Database configuration (cont.)

2.2 Content database

6. OPTIONAL: Now click on the "Add Content Database" link.

	Manage Nintex Workflow database settings			
View All Site Content	Use this page to manage the Nintex Workflow database settings.			
Central Administration	Configuration Database			
Operations	conniguration bacabase			
 Application Management 	MYDATABASESERVER Data Source=MYDATABASESERVER;Initial Catalog=NW2007DB;Integrated Security=True Edit			
🔯 Recycle Bin				
	Content Database listing			
	Data Source=MYDATABASESERVER;Initial Catalog=NW2007DB;Integrated Security=True			
	Add content database			

7. To add a content database, click the "Connect to existing database" check-box and click "OK" (button not shown).

Add content database				
Use this page to create a new Nintex Workflow content database.				
Database Name and Authentication Use of the default database server and database name is recommended for most cases. Use of Windows authentication is strongly recommended. To use SQL authentication, specify the credentials which will be used to connect to the database.	Database Server MYDATABASESERVER Database Name NW2007DB Image: Connect to existing database			
	Database Authentication			





3 Configure NW2007 server settings

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.

	Web Application Activation	
View All Site Content	Use this page to enable Nintex Workflow on a web application.	
Central Administration	Web Application	Web Application: http://MYSERVER
Operations		
Application Management		Activate Deactivate

3.2 Enable NW2007 Workflow actions

- 3. Click the "Application Management" tab then click on "Manage Allowed Actions" in the "Nintex Workflow Management" section.
- 4. Check the boxes of the actions you want to appear in the Workflow Designer then click "Save" (not shown).

Central Administration > Application Management > Manage Allowed Actions Manage Allowed Actions					
Use this page to ma	Use this page to manage the Workflow actions allowed for the current Farm				
The list of allowed	The list of allowed actions below have been set for the Farm level Add Action				
Category	Name	Description	🗆 Enabled		
Integration	Call web service	Send workflow data or the file in the workflow to a web service			
Integration	Create AD Account	Create an Account in Active Directory			
Integration	Execute SQL	Runs a SQL command			
Integration	Query LDAP	Queries LDAP for values			
Integration	Query XML	Process XML from a source.	\checkmark		
Integration	Start Workflow	Starts another workflow on the current item	\checkmark		
Libraries and lists	Cancel Checkout	Cancels the checkout status of an item	\checkmark		
Libraries and lists	Check in item	Check in an item in a list			
Libraries and lists	Check out item	Check out an item in a list			
Libraries and lists	Copy an item	Duplicate an item from a source list into a destination list			
Libraries and lists	Create an item	Allows the creation of a new list item	V		
Libraries and lists	Create List	Creates a new list on the nominated team site			
Libraries and lists	Delete an item	Remove an item from a list			
Libraries and lists	Log in the history list	Writes a log entry to the workflow history list	$\overline{\mathbf{v}}$		
Libraries and lists	Set approval status	Sets the content approval status of the item in the workflow	V		

3.3 Configure email settings

- 5. Click the "Application Management" tab then click on "Global Settings" in the "Nintex Workflow Management" section.
- 6. Fill in the appropriate details for your environment and click the OK button.

	Central Administration > Application Management > Global Settings Global Settings	
View All Site Content	Use this page to set Nintex Workflow global settings. These settings apply to all sites in all farms.	
Central Administration	Note: You must reset IIS for these changes to take effect	
Operations Application	Validator summary	
Management	Email Settings Outbound SMTP Server:	
🕑 Recycle Bin	The SMTP server address to use when sending email in Nintex workflows. From address: nintexworkflow@myportal.com	

It is now possible to activate Nintex Workflow 2007™ for the SharePoint Site Collection.



3 Configure NW2007 server settings

3.4 Enable and configure LazyApproval[™] settings

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

2. 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 LazyApproval" which you will need to click.

Central Administration								
Manage La		Central Administration > Application Management > Manage LazyApproval Settings Manage LazyApproval Settings						
		Use this page to manage the LazyApproval settings for the current Farm						
		LazyApproval has not been enabled on your server. 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 (not shown).

Central Administration > Application Manager Manage LazyApproval Se	
Use this page to manage the LazyApproval settings f	for the current Farm
LazyApproval has not been enabled on your s	server.
Note: You must reset IIS for these changes t	o take effect
Enable or Disable LazyApproval	
Alias	NintexWorkflow @

4. A list of allowed words will appear which are those that will be recognised by the LazyApproval process. You can add or remove terms at your discretion. Click the "OK" button when you are finished (not shown).

	istration > Application Management • LazyApproval Sett	
Use this page t	to manage the LazyApproval settings for t	he current Farm
🗉 Enable / Disa	able LazyApproval	
🗉 Create a Laz	zyApproval term for the current Farm	
Phrase		Outcome
approve		Approve
approved		Approve
decline		Deny
declined		Deny
no		Deny
ok		Approve
reject		Deny
		Deny
rejected		Bony

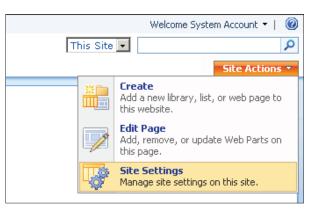




4 Activate features

4.1 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"

Top Site (Collection				
e					Site Act
	Top Site Collection > Site Settin	ngs			
	Site Settings				
	Site Information				
	Sice Information				
	Site URL:		http://myportal.company.com	n	
	Mobile Site URL:		http://myportal.company.com	n/m	
	Version:				
	Users and Permissions	Look and Feel	Galleries	Site Administration	Site Collection Administrat
	People and groups	Title, description, and icon	Master pages	Regional settings	Recycle bin
	 Site collection administrators 	Tree view	Site content types	Site libraries and lists	Site collection features
	Advanced permissions	Site theme	Site columns	Site usage report	Site hierarchy
		Top link bar	Site templates	User alerts	Portal site connection
		Quick Launch	List templates	= RSS	

3. In the "Nintex Workflow 2007" section, click the "Activate" button.

Top Site Collection > Site Settings > Site Features Site Collection Features	
Name	Status
Nintex Workflow 2007 Allow team sites in this site collection to utilize Nintex Workflow features	Activate

4. After a short delay, the page will refresh and the status will become "Active"

Top Site Collection > Site Settings > Site Features Site Collection Features		
Name		Status
Nintex Workflow 2007 Allow team sites in this site collection to utilize Nintex Workflow features	Deactivate	Active

5. To use the Nintex Workflow web parts on team sites in this site collection, also click "Activate" in the "Nintex Workflow 2007 Web Parts" section.

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



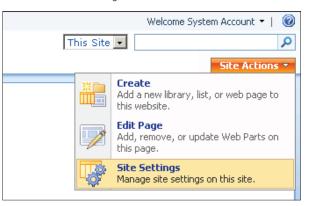


4 Activate features (cont.)

4.2 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"

Top Site Collection > Site Setti Site Settings	ngs			
Site Information				
Site URL:		http://myportal.company.com		
Mobile Site URL:		http://myportal.company.com/m		
Version:	rsion:			
Users and Permissions	Look and Feel	Galleries	Site Administration	Site Collection Administrati
People and groups	Title, description, and icon	Master pages	Regional settings	Recycle bin
Site collection administrators	Tree view	Site content types	Site libraries and lists	Site collection features
Advanced permissions	Site theme	Site columns	Site usage report	Site hierarchy
	Top link bar	Site templates	User alerts	Portal site connection
	Quick Launch	List templates	= RSS	
	Save site as template	Web Parts	Search visibility	
	Reset to site definition	Workflows	Sites and workspaces	
			Site features	

3. In the Nintex Workflow 2007[™] section, click the "Activate" button.

Site	Features	
	Name	Status
	Nintex Workflow 2007 Enables the creation and use of Nintex Workflows on libraries and lists in this site.	Activate

4. After a short delay, the page will refresh and the status will become "Active"

Site Features	
Name	Status
Nintex Workflow 2007 Enables the creation and use of Nintex Workflows on libraries and lists in this site.	Deactivate

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.

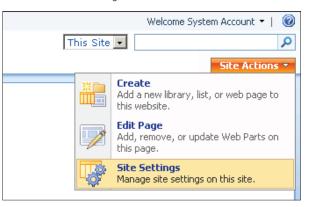


4 Activate features (cont.)

4.3 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"

Top Site Collection > Site Setti Site Settings	ngs			
Site Information				
Site URL:		http://myportal.company.com		
Mobile Site URL:		http://myportal.company.com/m		
Version:		12.0.0.4518		
Users and Permissions	Look and Feel	Galleries	Site Administration	Site Collection Administration
People and groups	Title, description, and icon	Master pages	Regional settings	Recycle bin
Site collection administrators	Tree view	Site content types	Site libraries and lists	Site collection features
Advanced permissions	Site theme	Site columns	Site usage report	Site hierarchy
	Top link bar	Site templates	User alerts	Portal site connection
	Quick Launch	List templates	= RSS	
	Save site as template	Web Parts	Search visibility	
	Reset to site definition	Workflows	Sites and workspaces	
			Site features	

3. In the Nintex Workflow 2007[™] section, click the "Activate" button.

	Name	Status
	Nintex Workflow 2007 Enables the creation and use of Nintex Workflows on libraries and lists in this site.	Activate
	Nintex Workflow 2007 Enterprise Reporting Enables the use of Nintex Workflow 2007 Enterprise Reporting on this site.	Activate

4. In the Nintex Workflow 2007 Enterprise Reporting section, click the "Activate" button.

		Name		Status
		Nintex Workflow 2007 Enables the creation and use of Nintex Workflows on libraries and lists in this site.	Deactivate	
	ETTERMISE	Nintex Workflow 2007 Enterprise Reporting Enables the use of Nintex Workflow 2007 Enterprise Reporting on this site.	Activate	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.



Appendix A: Notes on User Access Control (UAC)

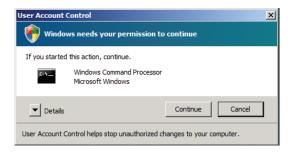
Appendix A

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

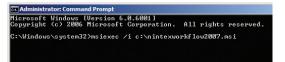
1. Click the start menu and right click on the Command Prompt option. Choose "Run as administrator".



2. Click the Continue button.



3. Type in the command msiexec /i c:\nintexworkflow2007.msi.



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