NINTEX® WORKFLOW 2007®

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 stand-alone SharePoint installations.

Installation Procedure Contents

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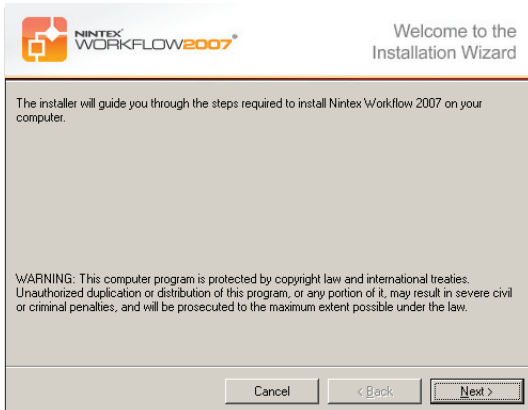
Installation Guide

1 Installing Nintex Workflow 2007™
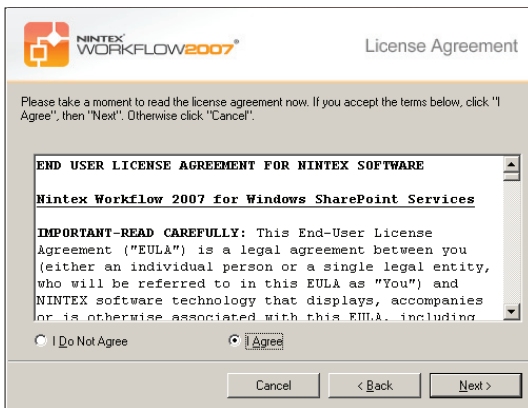
1.1 Run the installer

1. Login to the server as a SharePoint administrator with sufficient privileges to deploy solutions and features.
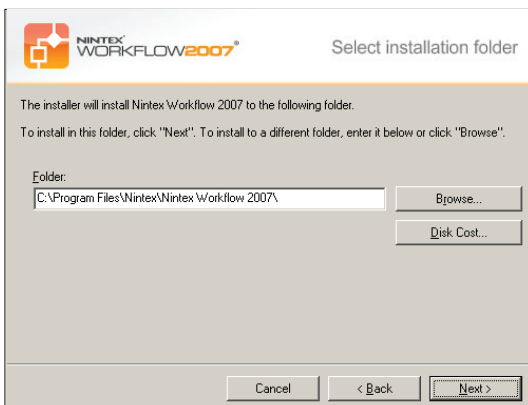
Double click the installer file (msi) and click "Next".

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

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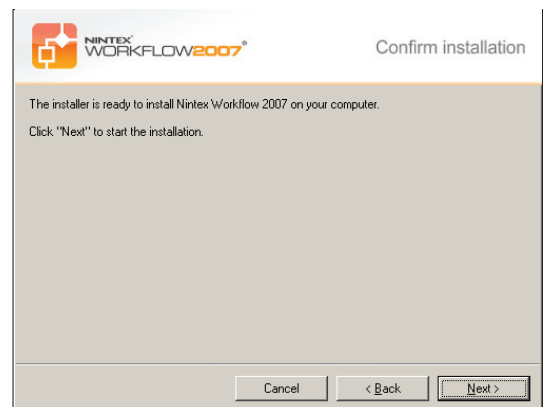

3. Select a location to install Nintex Workflow 2007. The default location is C:\Program Files\Nintex\Nintex Workflow 2007\ then click "Next".

4. Choose whether you want to add the solution to SharePoint now (recommended) or install it with stsadm at a later date (advanced).
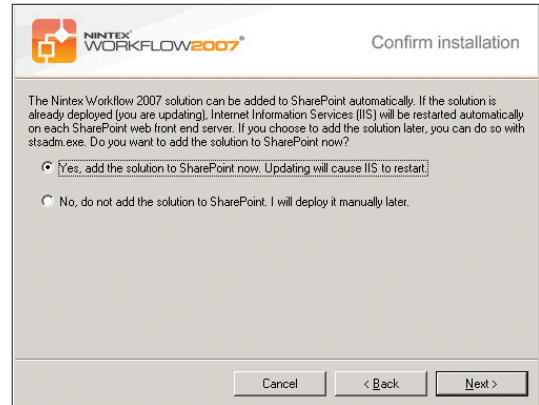
5. The installer will inform you it is ready to proceed. Click "Next"

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.

Central Administration > Operations > Solution Management

Solution Management

This page has a list of the Solutions in the farm.

Name	Status	Deployed To
nintexworkflow2007.wsp	Not Deployed	None
nintexworkflow2007enterprisefeatures.wsp	Not Deployed	None

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

Central Administration > Operations > Solution Management > Solution Properties

Solution Properties

Deploy Solution | Remove Solution | Back to Solutions

Name:	nintexworkflow2007.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:	nintexworkflow2007.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:
2/12/2007   12 PM ▾ 00 ▾

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. 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.

Central 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 > Solution Management > Solution Properties
Solution Properties

Deploy Solution | Remove Solution | Back 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   3 PM   00

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.**

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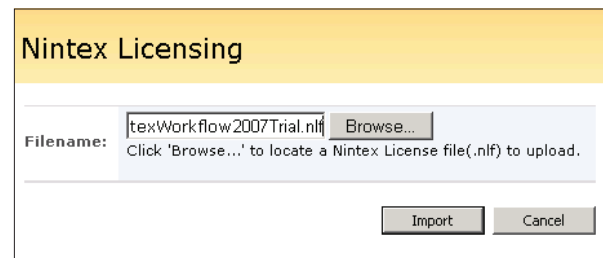# 1 Installing Nintex Workflow 2007™ (cont)

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".

Nintex Workflow Management
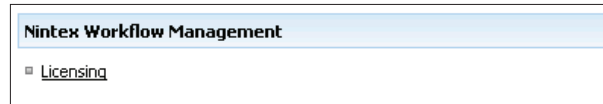
☐ Licensing

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

Nintex Licensing

Import

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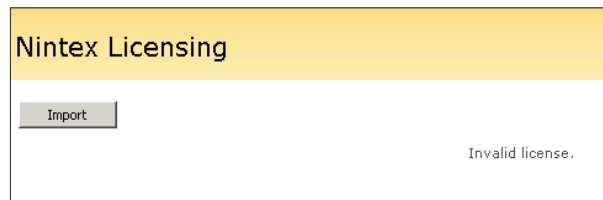
3. Click the browse button to locate your license file and once you have located it, click the "Import" button.

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.

Central Administration > Application Management > Nintex Licensing
Nintex Licensing

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™.

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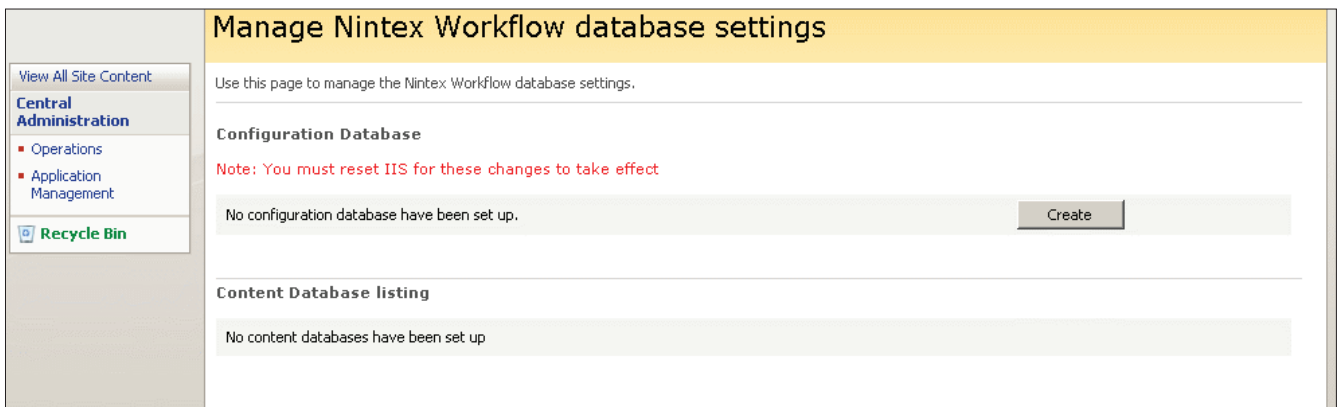
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2 Database configuration

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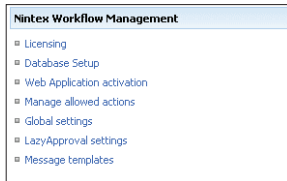
3. Click the "Create" button under "Configuration Database".

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

Note: Nintex Workflow 2007 cannot connect to a Windows Internal Database that is used by stand-alone SharePoint installations.

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

☐ Connect to existing database

Database authentication

◉ Windows authentication (recommended)

○ SQL authentication

Account

Password

[OK] [Cancel]
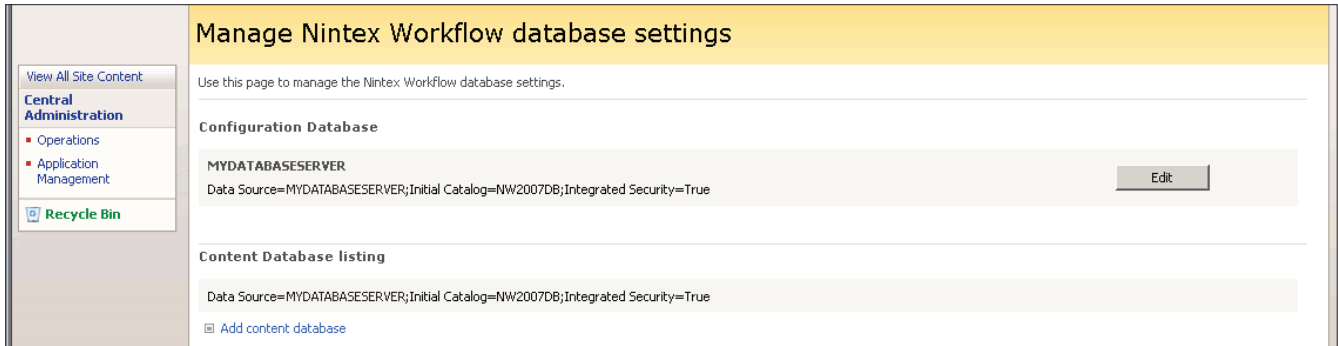
5. Enter a name for the database. Please note, NW2007 can use multiple databases, one for configuration and others for content. By default the configuration database is also made the content database. You can add more databases optionally.

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2 Database configuration (cont.)

2.2 Content database

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

Manage Nintex Workflow database settings

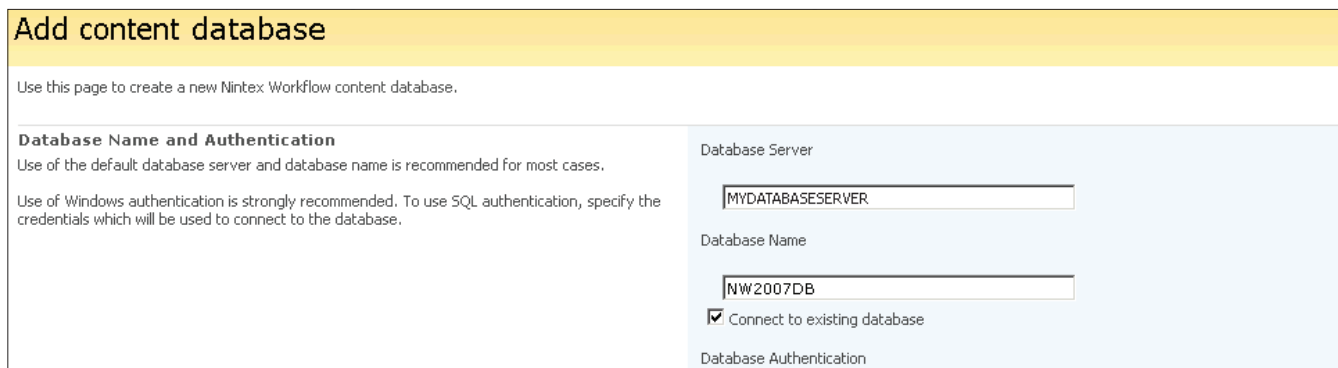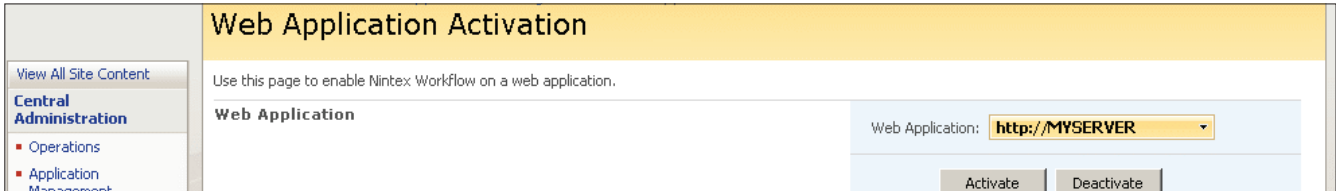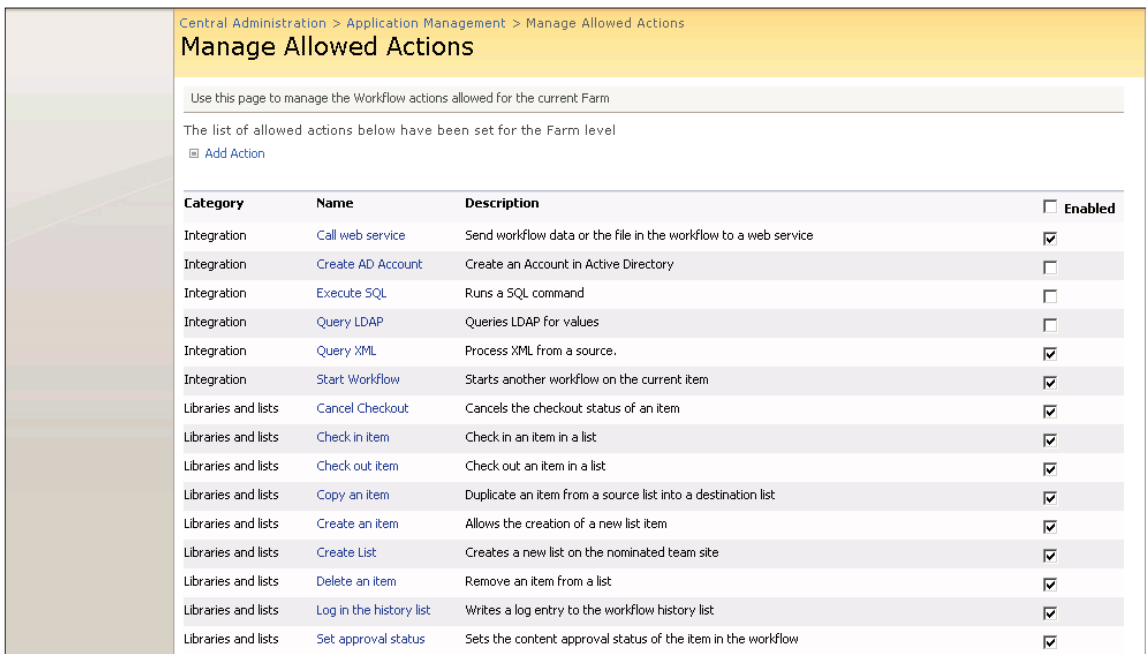Use this page to manage the Nintex Workflow database settings.

View All Site Content
Central Administration
- Operations
- Application Management

Recycle Bin

Configuration Database

MYDATABASESERVER
Data Source=MYDATABASESERVER;Initial Catalog=NW2007DB;Integrated Security=True

[Edit]

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

☑ Connect to existing database

Database Authentication

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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.

3.2 Enable NW2007 Workflow actions
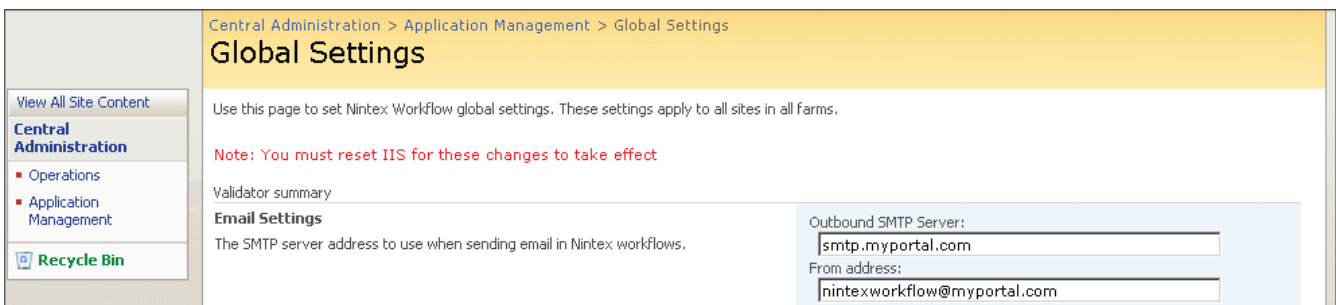
3. Click the "Application Management" tab then click on "Manage Allowed Actions" in the "Nintex Workflow Management" section.

4. Check the boxes of the actions you want to appear in the Workflow Designer then click "Save" (not shown).

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.

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

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# 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.
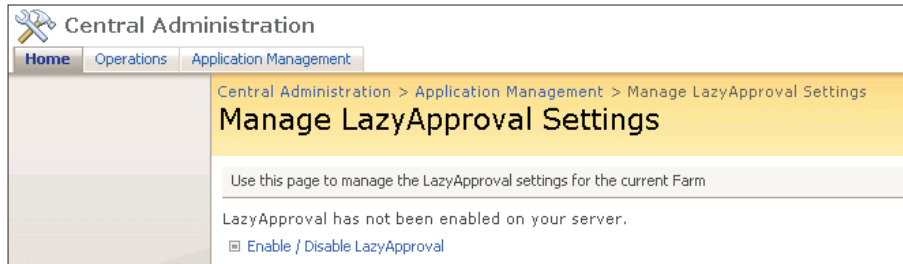
3. Now select the "Enabled" option. You will be asked for an "alias" which is the name that will be used in the email address that sends the notifications and accepts the LazyApproval replies. Press the "OK" button (not shown).
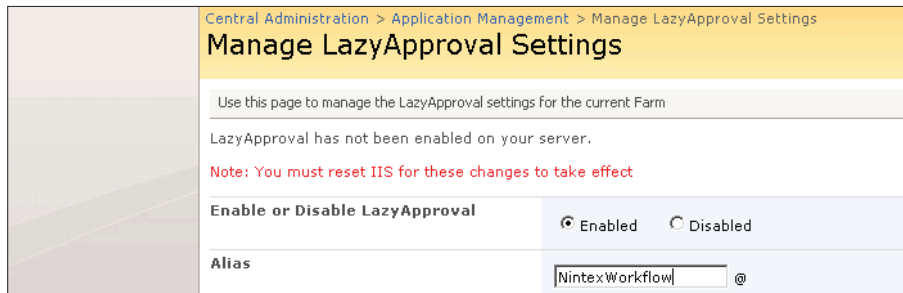
4. A list of allowed words will appear which are those that will be recognised by the LazyApproval process. You can add or remove terms at your discretion. Click the "OK" button when you are finished (not shown).
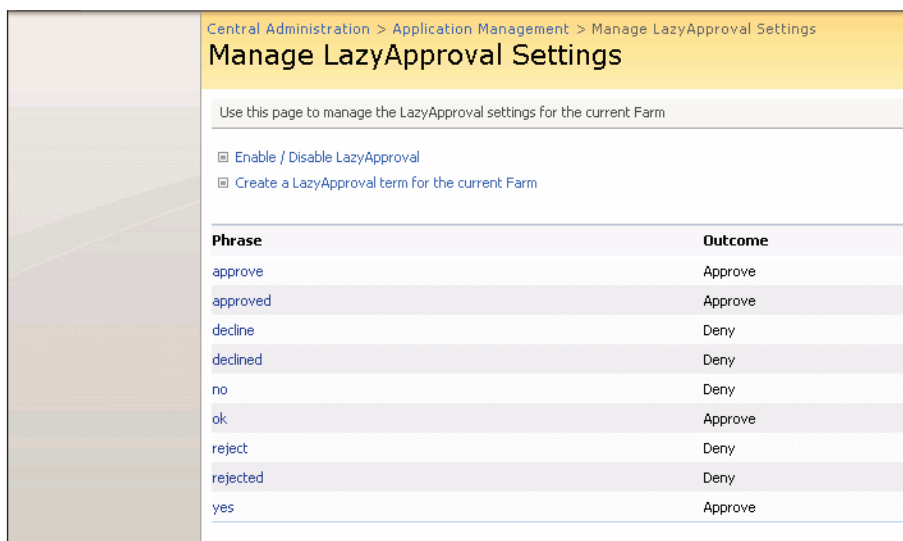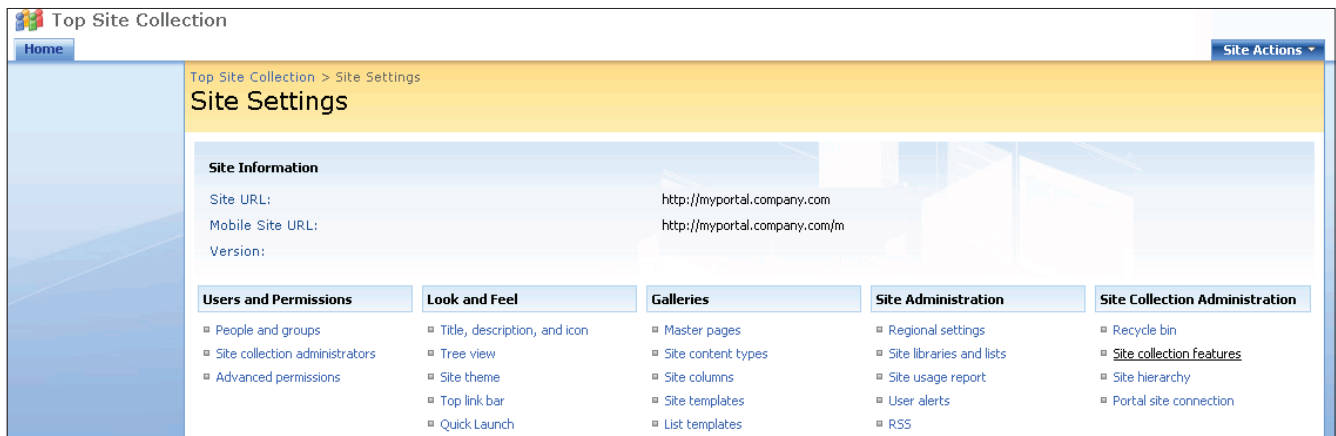
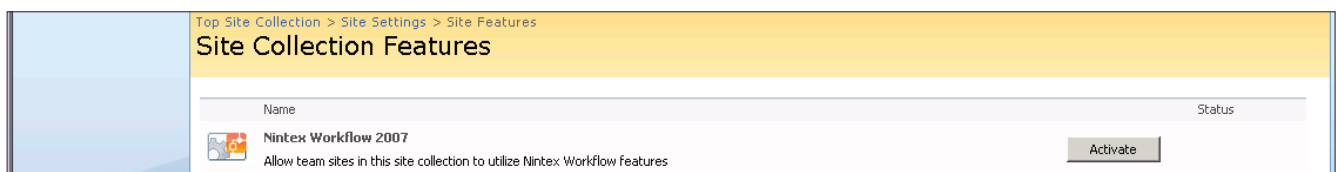# 4 Activate features

4.1 Site collection activation

1. Navigate to your Top Site level home page and click "Site Actions > Site Settings"
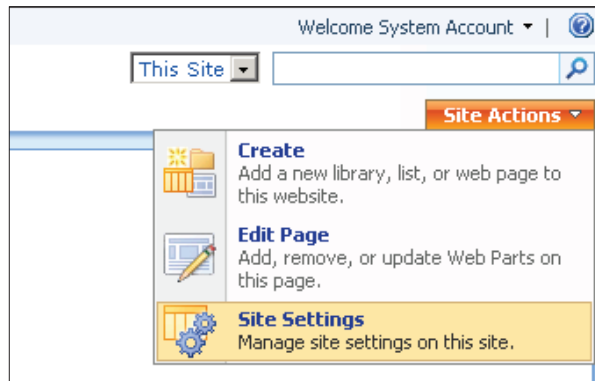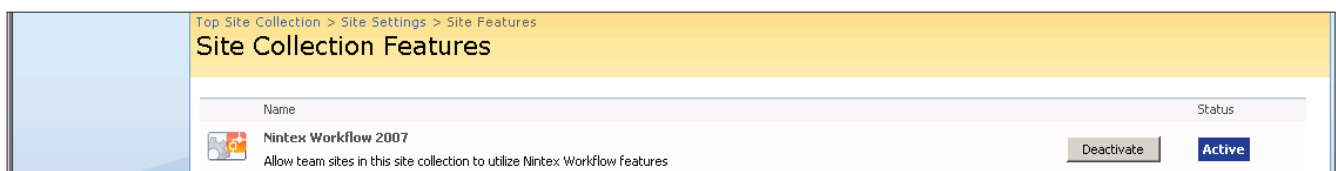

2. In the right column, "Site Collection Administration", click "Site Collection Features"

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, also click "Activate" in the "Nintex Workflow 2007 Web Parts" section.

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

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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.
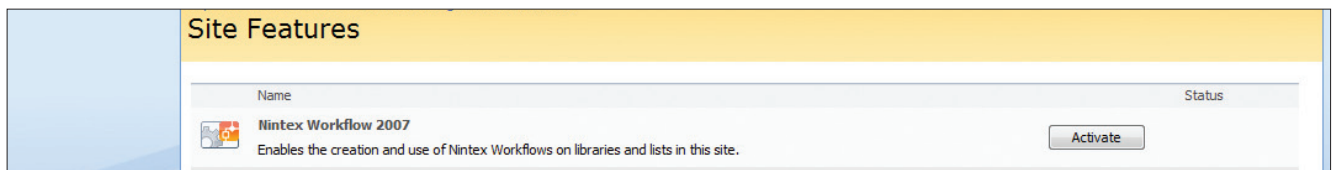
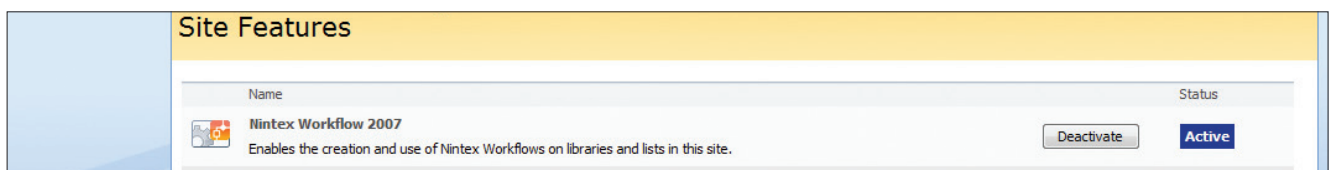**1.** From the Top Site level home page, click "Site Actions > Site Settings"
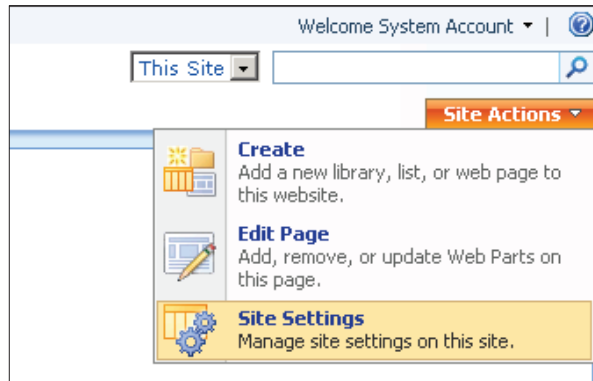
2. In the right column, "Site Administration", click "Site Features"

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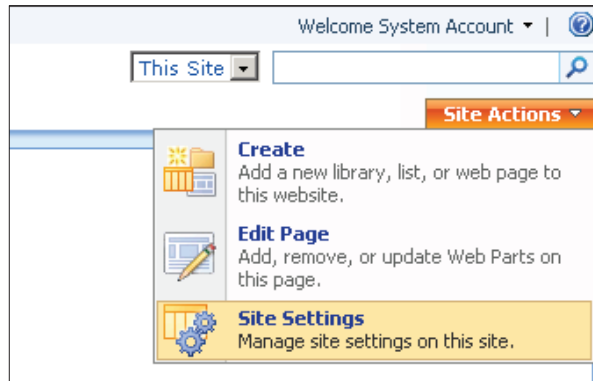
It is now possible to design and interact with Nintex Workflow 2007™. For more information, please refer to the product help files, accessible from any page that uses Nintex Workflow 2007 functionality.

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.
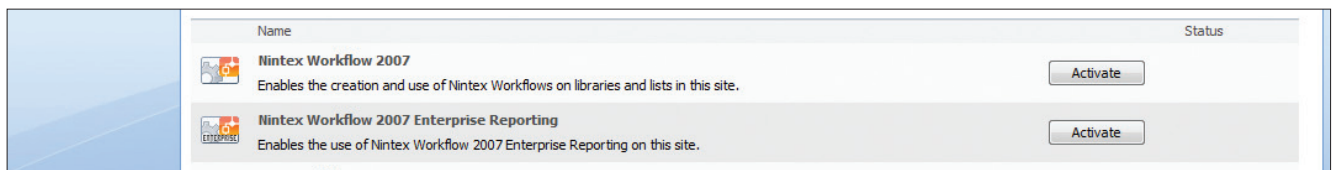
1. From the Top Site level home page, click "Site Actions > Site Settings"
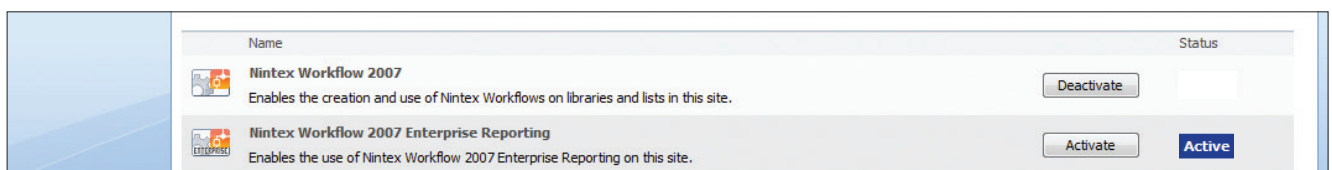
2. In the right column, "Site Administration", click "Site Features"

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.

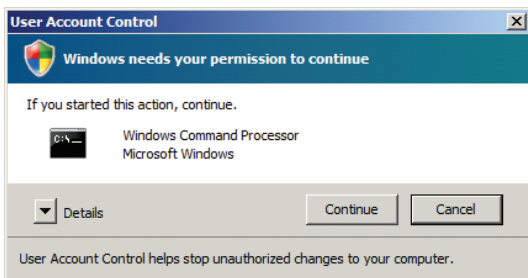# Appendix A: Notes on User Access Control (UAC)

Appendix A

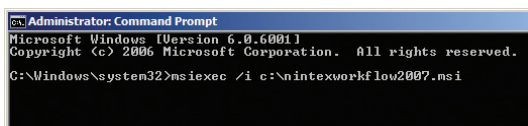If the environment has UAC enabled the msi must be run with administrator privileges.

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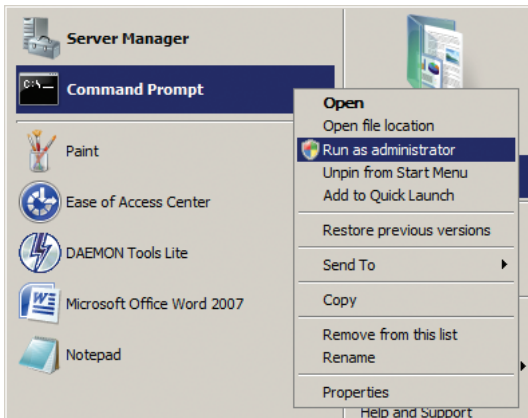
2. Click the Continue button.

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

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

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