



Nintex[®] Workflow

Nintex Workflow 2013 Installation guide

NINTEX[®] Workflow for Everyone

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System Requirements

Operating System

Nintex Workflow 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 greater is recommended.

Software

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

- Microsoft SharePoint Foundation 2013 or Microsoft SharePoint Server 2013
- SQL Server 2008 R2 SP1 or SQL Server 2012.

1. Installing Nintex Workflow 2013

Before running the Installer

To help ensure Nintex Workflow 2013 installs successfully:

- a) We recommend disabling UAC (User Account control), as this may prevent you from installing Nintex Workflow 2013 successfully. See [here](#) for information on how to do this.
- b) **Ensure you are** logged into the server with the SharePoint Farm Installation account. 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 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 export it for manual deployment later using SharePoint PowerShell. Click “Next”.

Note: Nintex Workflow 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. The installer will inform you it is ready to proceed. Click “Next”.
6. Click the “Close” button. SharePoint Central Administration will have loaded in the background.

1.2 Deploy the Solution Package

1. Navigate to “Central Administration” and click on “System Settings”.
2. Click on “Manage farm solutions” in the “Farm Management” section. The solution “ninteworkflow2013.wsp” should be visible.

You will also see two additional solutions:

- “ninteworkflow2013backwardscompatibilityui.wsp” you should only deploy this if you intend to perform a database attach upgrade from SharePoint 2010;
 - “ninteworkflow2013enterprisefeatures.wsp” you should only deploy this if you have been licensed for the Enterprise version.
3. Click the “ninteworkflow2013.wsp” link and then click “Deploy Solution” 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 “Solutions Management” page. Nintex Workflow 2013.wsp should now appear as “Deployed”.

6. Repeat steps 3-4 and deploy “nintexworkflow2013.wsp” again. Select your Central Administration web application as the “Deploy To?” location.

1.3 Installing Nintex Workflow 2013 Backwards Compatibility UI Features (optional)

1. Navigate to “Central Administration” and select “System Settings”. Click on “Manage farm solutions”.
2. Click “nintexworkflow2013backwardscompatibilityui.wsp” link and then click “Deploy Solution” 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 “Solutions Management” page. “nintexworkflow2013backwardscomptabilityui.wsp” should now appear as “Deployed”.

1.4 Installing Nintex Workflow 2013 Enterprise Features (optional)

1. Navigate to “Central Administration” and select “System Settings”. Click on “Manage farm solutions”.
2. Click “nintexworkflow2013enterprisefeatures.wsp” link and then click “Deploy Solution” 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 “Solutions Management” page. “nintexworkflow2013enterprisefeatures.wsp” should now appear as “Deployed”.
5. Repeat steps 2-3 and deploy “nintexworkflow2013enterprisefeatures.wsp” again. Select your Central Administration web application as the “Deploy To?” location.

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

1.5 Importing the License

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

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

You can now proceed to configure databases for Nintex Workflow 2013.

2. Database Configuration

2.1 Configuring the Database

1. Navigate to “Nintex Workflow Management” and click “Database setup”.
2. Click the “Create” button in “Configuration Database”.
3. Enter the name of your database server and a database name.

Note: The Database Server will default to the default SharePoint database server.

Note: Nintex Workflow 2013 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 if required.

4. Click “OK”.

Note: In small farm scenarios it is reasonable to use the same database for the content and configuration databases. By adding multiple content databases Nintex Workflow 2013 can automatically distribute the workflows within each site collection to their separate content databases to help spread the load.

2.2 Adding a Content Database (optional)

1. Navigate to “Central Administration” and click on “Nintex Workflow Management”. Select “Database setup”.
2. Click “Add content database” in the “Content Databases” section.
3. Repeat steps 3 and 4 in section 2.1.
4. In the Configuration Databases section, you will now see two content databases connection strings.

3. Configure Nintex Workflow 2013 Server Settings

3.1 Web Application Activation

1. Navigate to “Central Administration” and select “Nintex Workflow Management”. Click on “Web Application Activation”.
2. The default web application name should be automatically chosen. Click “Activate”.

3.2 Enable Nintex Workflow 2013 Workflow Actions

1. Navigate to “Central Administration” and select “Nintex Workflow Management”. Click “Manage allowed actions”.
2. Check the boxes of the actions you want to appear in the Workflow Designer and then click “OK”.

3.3 Configuring Email Settings

1. Navigate to “Central Administration” and select “Nintex Workflow Management”. Click “Global settings”.
2. Fill in the appropriate details for your environment and click “OK”.

3.4 Enabling and Configuring LazyApproval™ (optional)

1. Navigate to “Central Administration” and select “Nintex Workflow Management”. Click the “LazyApproval™ Settings”.
2. Click on “Enable / Disable LazyApproval™ for the current server farm”.
3. Click on “Configure server incoming mail settings” and configure according to your SharePoint configuration documentation.
4. Return to the “LazyApproval™” page after completing your configuration. Select “Yes” in the “Enable LazyApproval™ via email” section. You will be asked for an “Alias”. This is the name that will be used in the email address that sends the notifications and accepts the LazyApproval™ replies. Press “OK”.
5. A list of allowed words recognized by the LazyApproval™ process will appear. Add or remove terms at your discretion.

4. Nintex Live

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: 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 3, manually install and deploy the “nintexlivecore.wsp” and import all certificates from the “Certs” folder. The “nintexlivecore.wsp” and “Certs” folder can be accessed by choosing to export the solution for manual deployment in section 1.1, step 4.

Important: If you installed Nintex Workflow 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 select “Nintex Live Management”. Click on “Health Checks”.
2. If the 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 Enabling Nintex Live for Nintex Workflow

1. Navigate to “Central Administration” and select “Nintex Workflow Management”. Click on “Live settings”.
2. Click “Enable” in the “Enable Nintex Live for Nintex Workflow” section and then “OK”.

5. Activate Features

5.1 Site Collection Activation

1. Navigate to your Top Site level home page. Click the Gear icon and then select “Site Settings”.
2. Click “Site collection features” in the “Site Collection Administration” section.
3. Navigate to “Nintex Workflow 2013” and click “Activate”.
4. After a short delay, the page will refresh and the status will become “Active”.
5. Navigate to “Nintex Workflow 2013 InfoPath Forms” and click “Activate” to use start forms and task forms designed with Microsoft InfoPath 2013 on sites in this site collection.
6. Navigate to “Nintex Workflow 2013 Web Parts” and click “Activate” to use Nintex Workflow web parts on sites in this site collection.
7. Navigate to “Nintex Workflow 2013 Reporting Web Parts” and click “Activate” to use Nintex Workflow Enterprise reporting web parts on sites in this site collection.

Note: This feature is only available for Enterprise version.

8. Navigate to “Nintex Workflow - Nintex Live Catalog” and click “Activate” to use Nintex Live Catalog on sites in this site collection.

Note: This feature is only available if the Nintex Live for Nintex Workflow feature has been enabled.

It is now possible to activate Nintex Workflow 2013 features in sites.

5.2 Site Activation

1. Navigate to a Top Site level home page. Click on the Gear icon and then select “Site Settings”.
2. Click “Manage site features” in the “Site Actions” section.
3. Locate “Nintex Workflow 2013” and click “Activate”.
4. After a short delay, the page will refresh and the status will become “Active”.
5. To use the Nintex Workflows 2013 Enterprise Reporting Web Parts on sites in this site collection, locate “Nintex Workflow 2013 Enterprise Reporting” and click “Activate”.

Note: This feature is only available for Enterprise version.

It is now possible to design and interact with Nintex Workflow 2013.

Appendix A: Notes on SharePoint services required to run workflows

Refer to the technical paper below for additional information about the SharePoint services that need to be enabled and running in order for your SharePoint farm to successfully run workflows (Available in English only).

- [Workflows and the SharePoint services required to run them](#)