NINTEX Workflow2010

Installation & User Guide

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Microsoft GOLD CERTIFIED Partner

Microsoft SharePoint 2010

System Requirements

Operating System
Nintex Workflow 2010™ must be installed on Microsoft Windows Server 2008 or 2008 R2.

Browser Client
Microsoft Internet Explorer 7.x although Microsoft Internet Explorer 8 or greater is recommended.

Software
Nintex Workflow 2010™ requires that the following software is installed and correctly configured:

- Microsoft SharePoint Foundation 2010 or Microsoft SharePoint Server 2010
- SQL Server 2005 or SQL Server 2008

Contents

Installing Nintex Workflow 2010™

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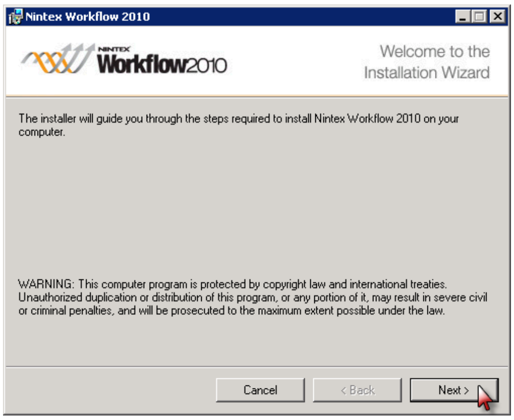
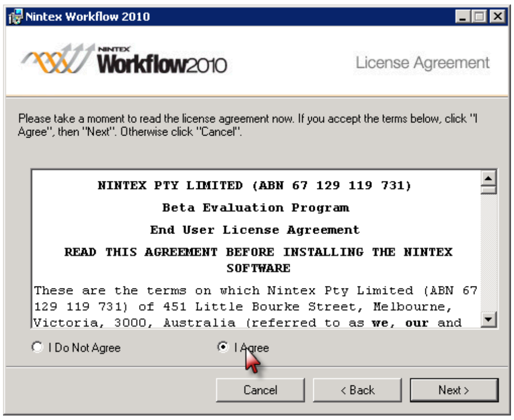
1.1 Run the Installer

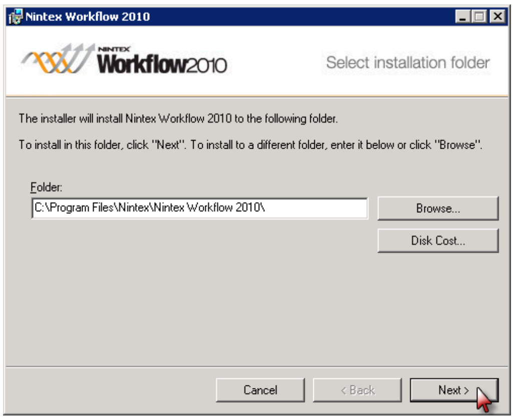
1. **Login to the server as a SharePoint administrator with sufficient privileges to deploy solutions and features.**
   Double click the installer file (msi) and click "Next".
   NOTE: See Appendix A if you have User Access Control (UAC) enabled



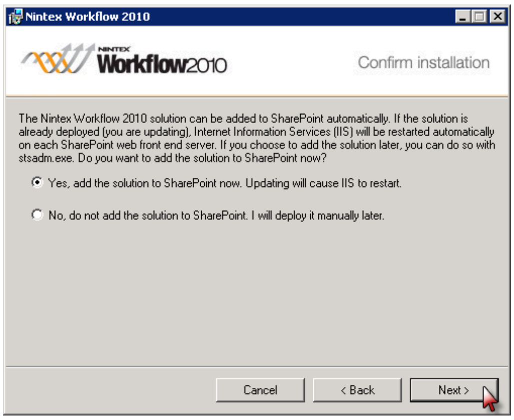
2. Read the End-User License Agreement. You must select "I Agree" for the installation to proceed. Click "Next".



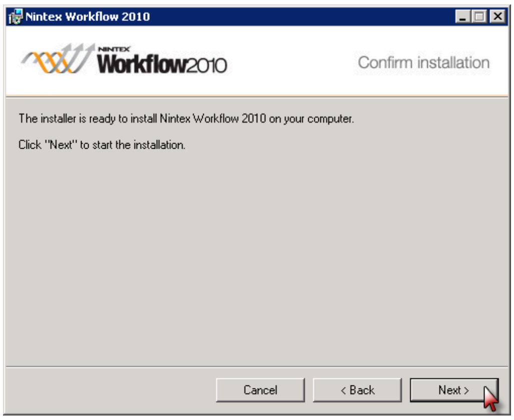
3. Select a location to install Nintex Workflow 2010. The default location is C:\Program Files\Nintex\Nintex Workflow 2010\ then click "Next".



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 the 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.

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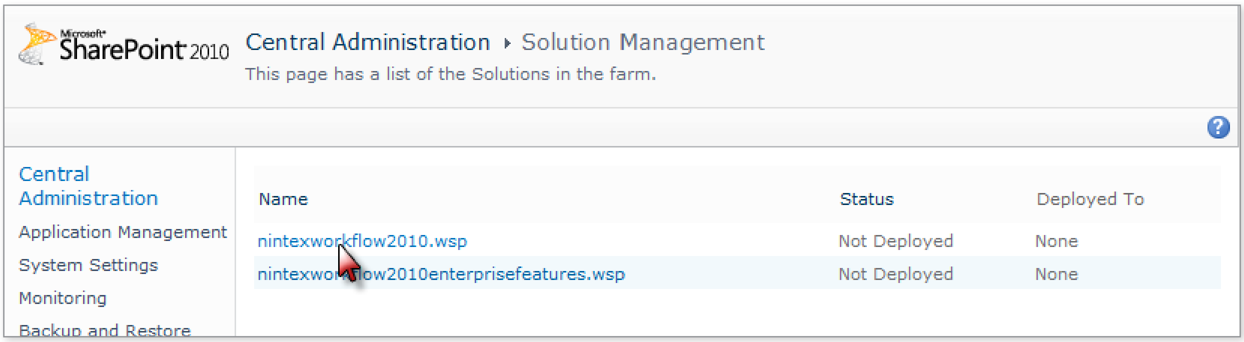
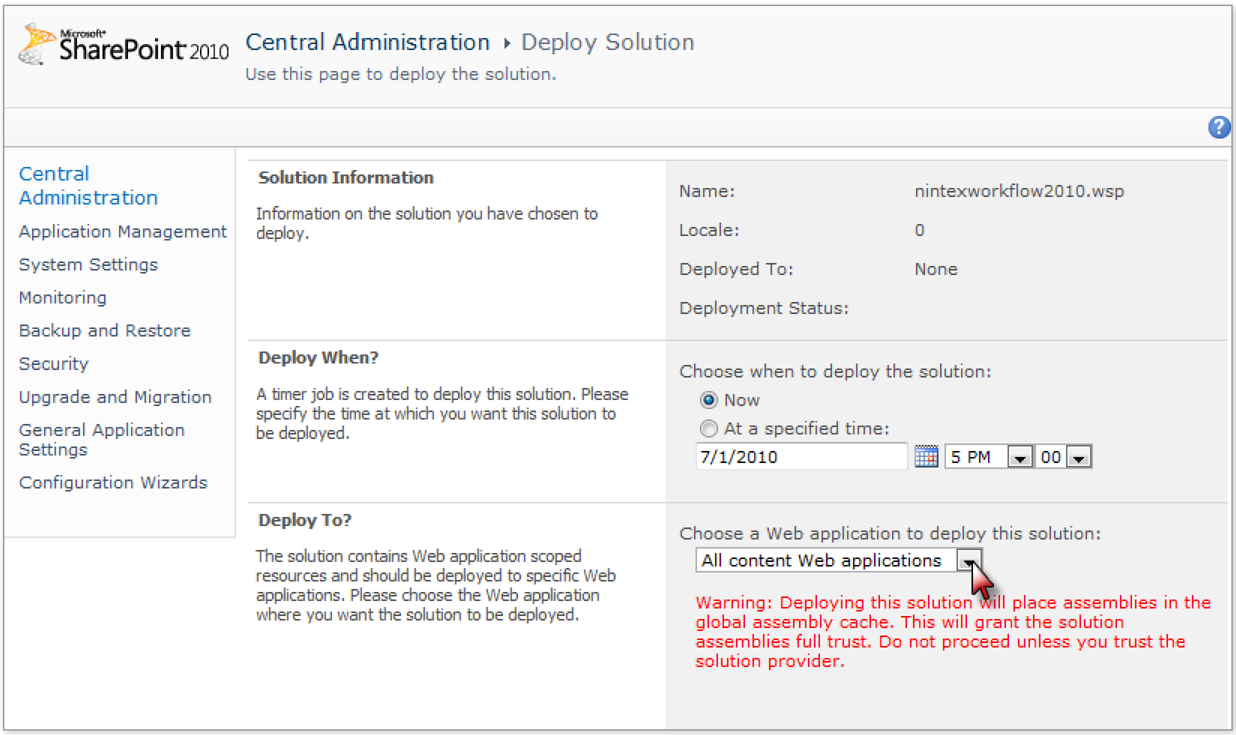
1.2 Deploy the Solution Package

1. In Central Administration, Solution Management, the solution "nintexworkflow2010.wsp" should be visible. You will also see an entry for "nintexworkflow2010enterprisefeatures.wsp" however you should only deploy this if you have been licensed for the Enterprise version.



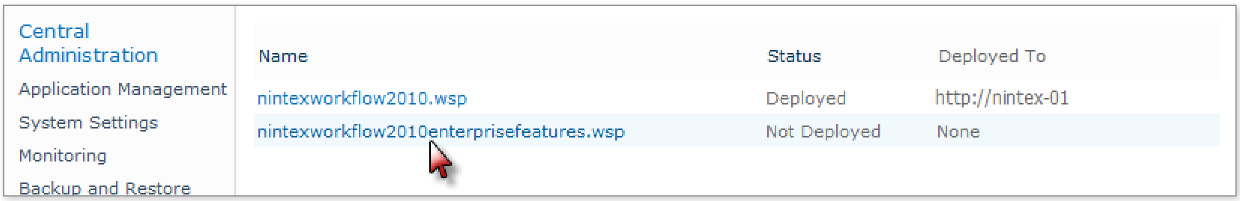
2. Click the "nintexworkflow2010.wsp" link and then click the "Deploy Solution" link in the toolbar.
3. In the "Deploy To?" section, ensure that "All content Web applications" is selected then click the "OK" button (button not shown).



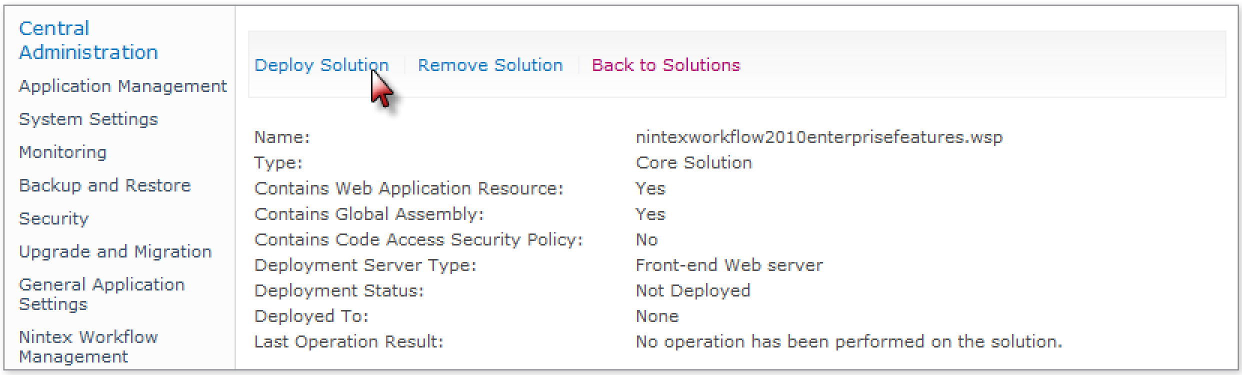
4. After a short interval, you will be returned to the "Solutions Management" page. Nintex Workflow 2010™ should now appear as "Deployed".

1.3 Installing Nintex Workflow 2010™ Enterprise Features (optional extra)

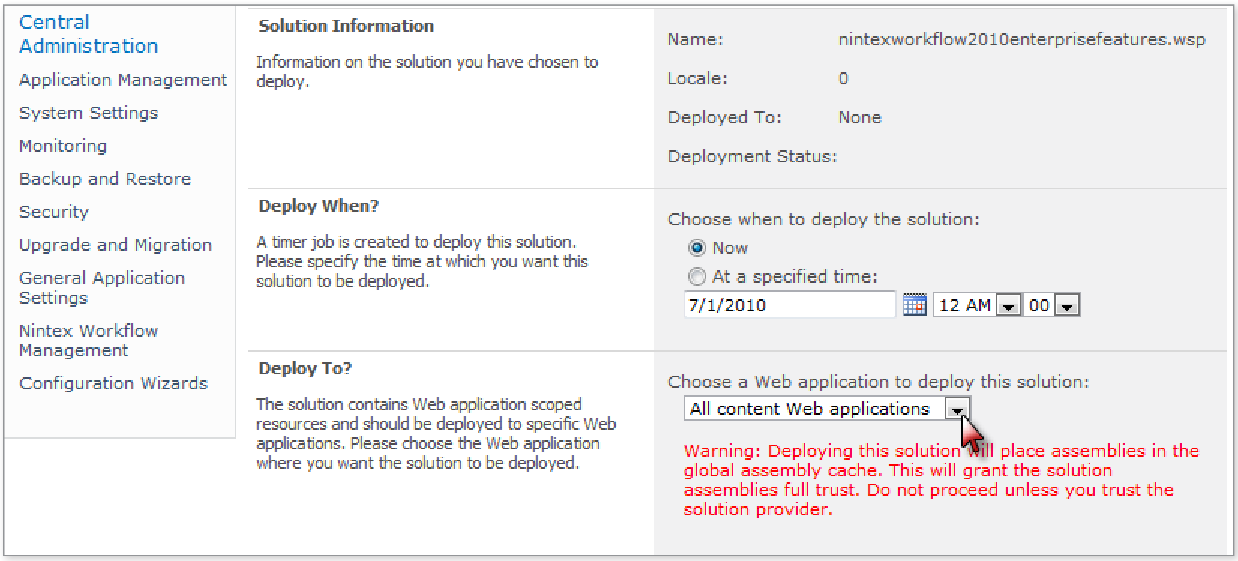
1. In Central Administration, select System Settings then "Manage farm solutions" in the Farm Management section.



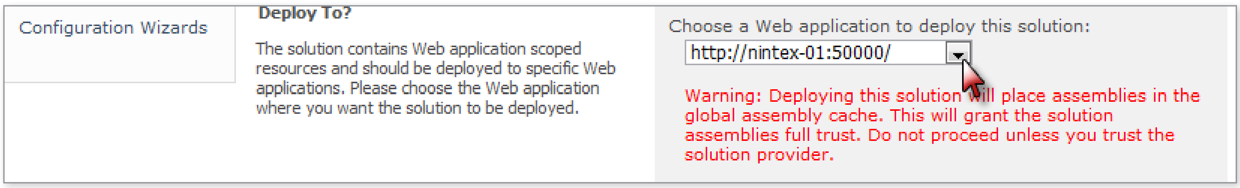
2. Click the "nintexworkflow2010enterprisefeatures.wsp" link and then click "Deploy Solution".



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



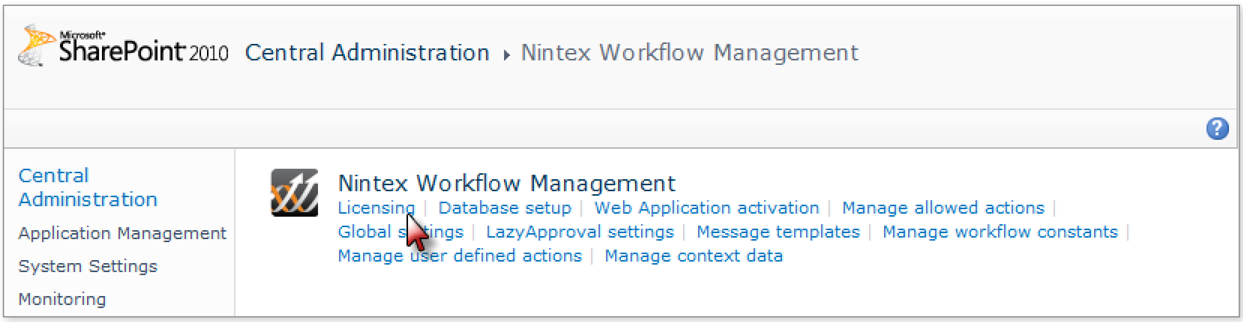
4. After a short interval, you will be returned to the "Solutions Management" page. NintexWorkflow2010EnterpriseFeatures.wsp should now appear as Deployed. Repeat the step and deploy "NintexWorkflow2010EnterpriseFeatures.wsp" again, and select your Central Administration web application as the 'Deploy To' location.



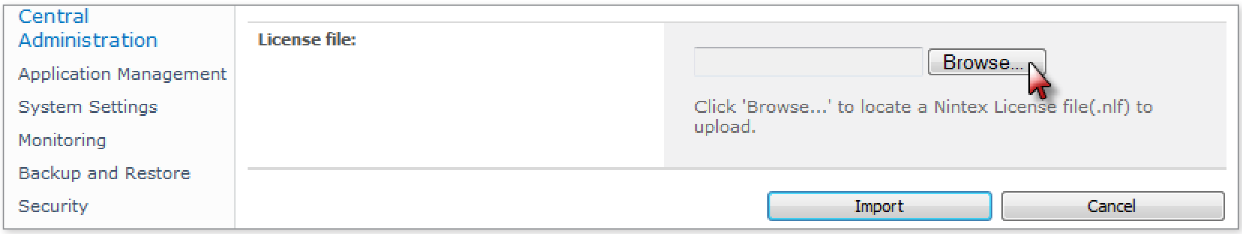
NOTE: This is required to run the administration reports via SharePoint Central Administration.

1.4 Importing the License

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, in the Nintex Workflow Management section, click the link "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 2010™.

Database Configuration

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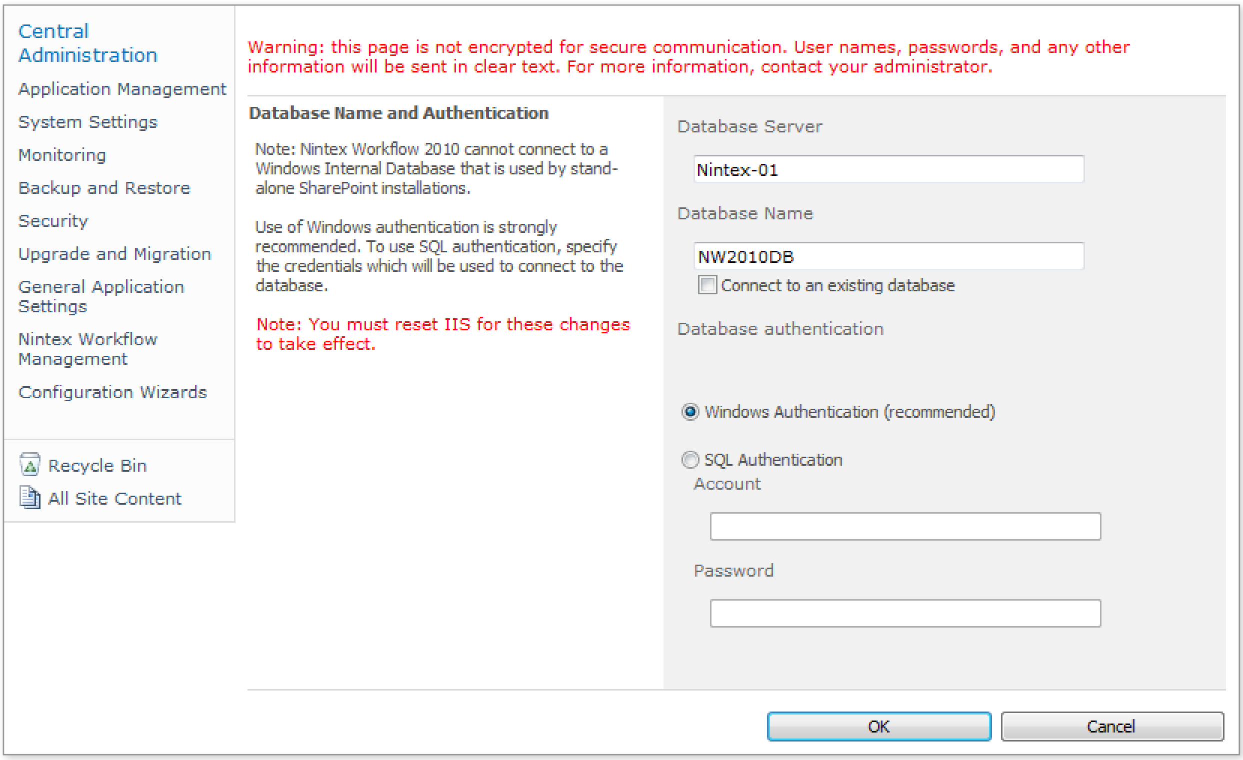
2.1 Configuration Database

1. In the section "Nintex Workflow Management", click "Database Setup".
2. Click the "Create" button under "Configuration Database".
3. Enter the name of your database server (note, it defaults to the default SharePoint database server).

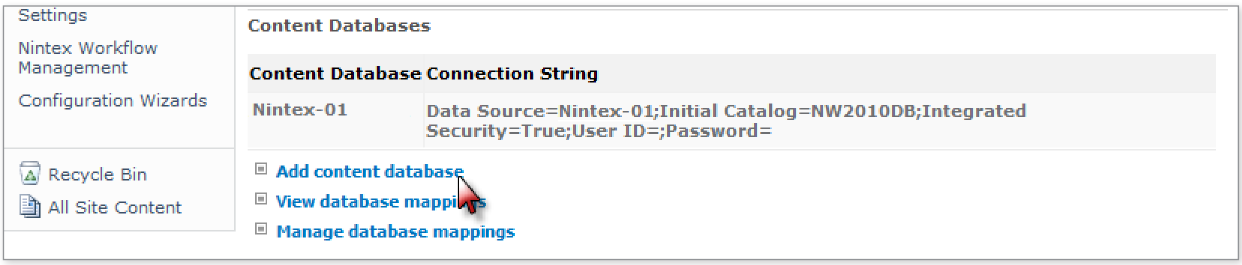


4. Enter a name for the database and click "OK". Please note, NW2010 can use multiple databases, one for configuration and others for content. By default the configuration database is also made the content database You can add more databases optionally if required.

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 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 extra)

1. In the section "Nintex Workflow Management", click "Database Setup".
2. In the "Content Databases" section, click "Add content database".

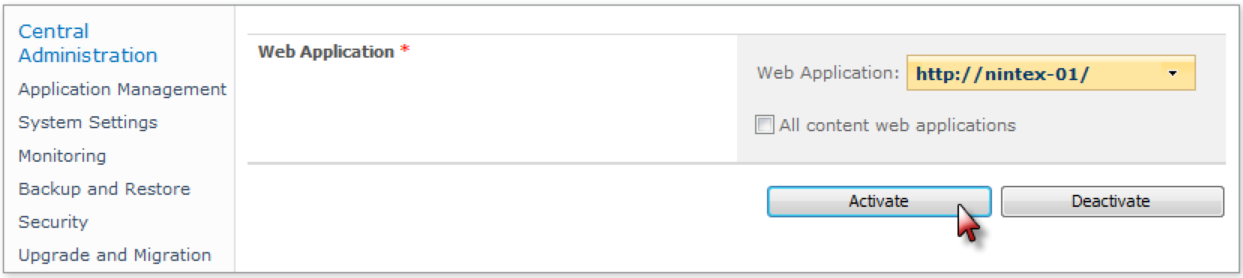


3. Repeat steps 3-4 in Chapter 2.1.
4. In the Configuration Databases section, you will now see 2 content databases connection string. The first one created as per Chapter 2.1 and the new one as performed in this Chapter.

Configure NW2010 Server Settings 3

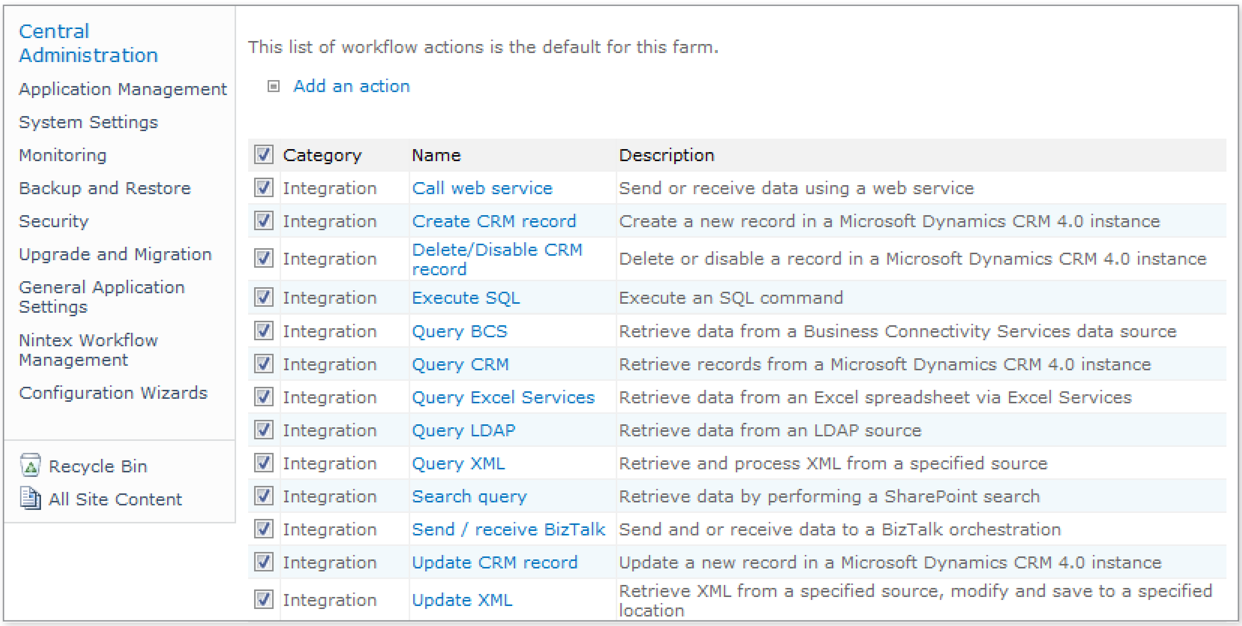
3.1 Web Application Activation

1. In the section "Nintex Workflow Management", click on "Web Application Activation".
2. The default web application name should be chosen automatically. Click the "Activate" button.



3.2 Enable NW2010 Workflow Actions

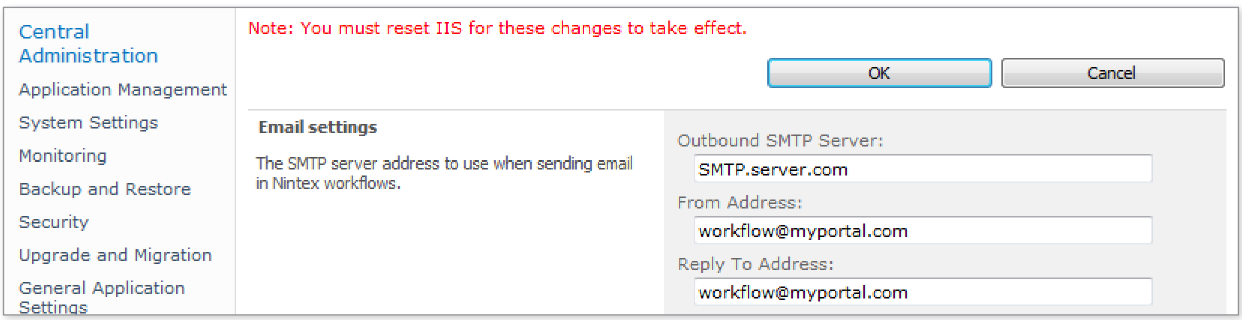
1. In the section "Nintex Workflow Management", click on "Manage allowed actions".
2. Check the boxes of the actions you want to appear in the Workflow Designer then click "Ok" (not shown).



Category	Name	Description
Integration	Call web service	Send or receive data using a web service
Integration	Create CRM record	Create a new record in a Microsoft Dynamics CRM 4.0 instance
Integration	Delete/Disable CRM record	Delete or disable a record in a Microsoft Dynamics CRM 4.0 instance
Integration	Execute SQL	Execute an SQL command
Integration	Query BCS	Retrieve data from a Business Connectivity Services data source
Integration	Query CRM	Retrieve records from a Microsoft Dynamics CRM 4.0 instance
Integration	Query Excel Services	Retrieve data from an Excel spreadsheet via Excel Services
Integration	Query LDAP	Retrieve data from an LDAP source
Integration	Query XML	Retrieve and process XML from a specified source
Integration	Search query	Retrieve data by performing a SharePoint search
Integration	Send / receive BizTalk	Send and or receive data to a BizTalk orchestration
Integration	Update CRM record	Update a new record in a Microsoft Dynamics CRM 4.0 instance
Integration	Update XML	Retrieve XML from a specified source, modify and save to a specified location

3.3 Configure Email Settings

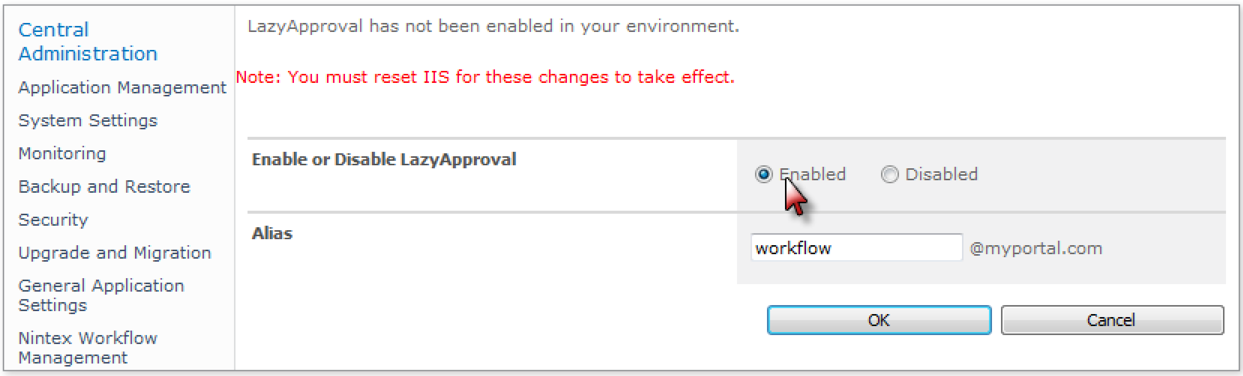
1. In the section "Nintex Workflow Management", click on "Global settings".
2. Fill in the appropriate details for your environment and click the "OK" button.



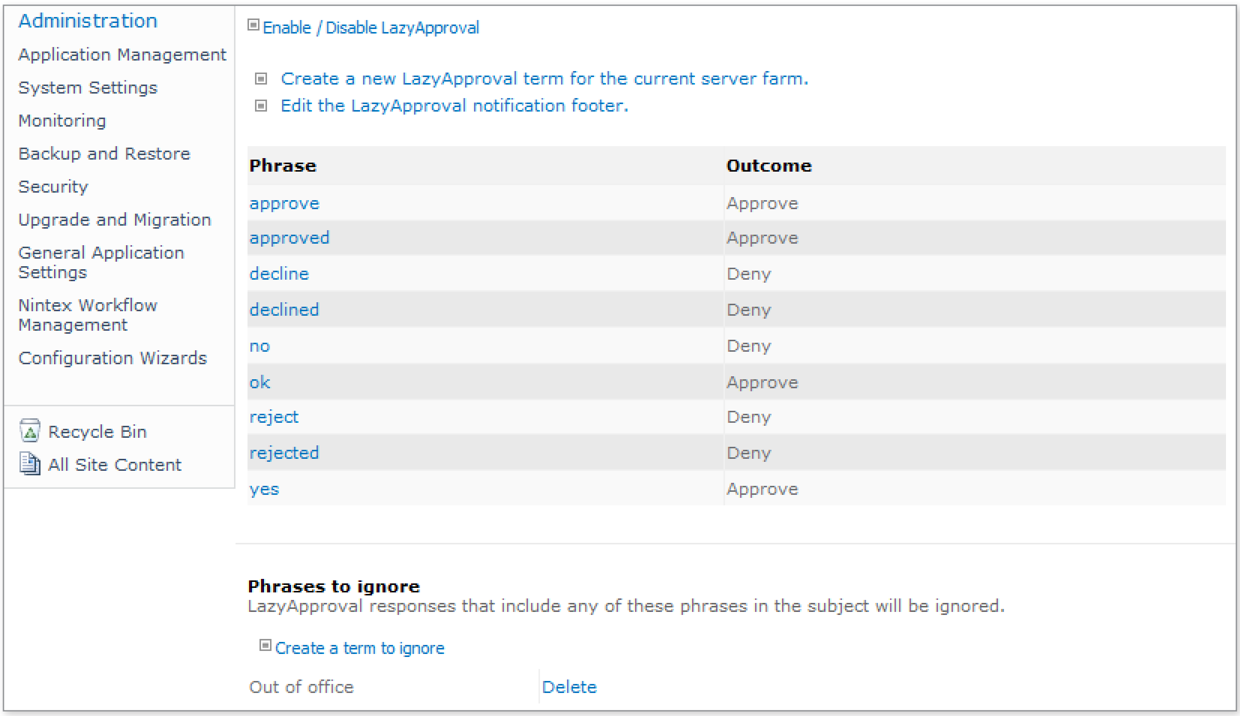
3.4 Enable and Configure LazyApproval™ (optional extra)

1. In the section "Nintex Workflow Management", click on "LazyApproval Settings".
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 / Disable 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.



4. A list of allowed words recognized by the LazyApproval process will appear. You can add or remove terms at your discretion.



Activate Features

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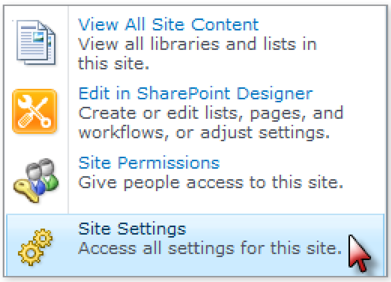
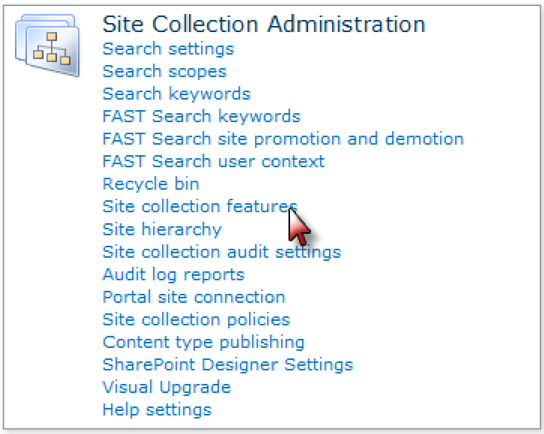
4.1 Site Collection Activation

1. To activate Nintex Workflow features on a site, 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 2010" section, click the "Activate" button.

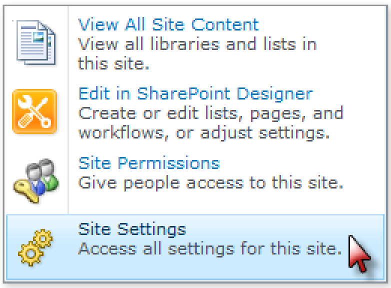
4. After a short delay, the page will refresh and the status will become "Active".
5. To use start forms and task forms designed with Microsoft InfoPath 2010 on sites in this site collection, click "Activate" in the "Nintex Workflow 2010 InfoPath Forms" section.
6. To use the Nintex Workflow web parts on sites in this site collection, click "Activate" in the "Nintex Workflow 2010 Web Parts" section.
7. To use Nintex Workflow Enterprise reporting web parts on sites in this site collection, click "Activate" in the "Nintex Workflow 2010 Reporting Web Parts" section. This feature is only available for Enterprise version.

It is now possible to activate Nintex Workflow 2010™ features in sites.

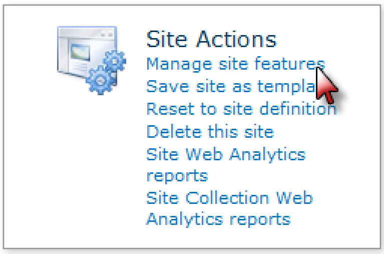
4.2 Site Activation

Enabling Nintex Workflow 2010™ for a site involves the same process as enabling it for a site collection except step 2.

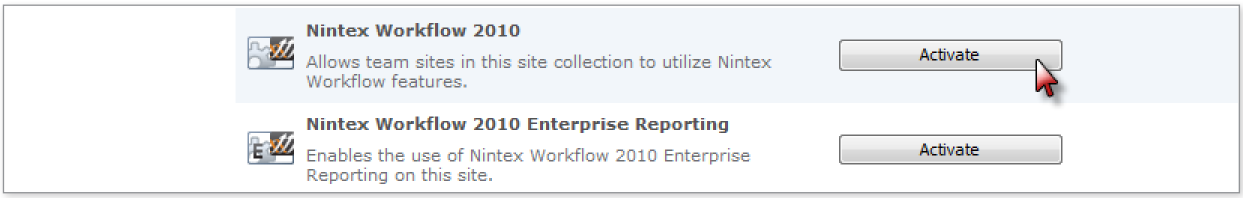
1. From the Top Site level home page, click "Site Actions" > "Site Settings".



2. In the right column, "Site Actions", click "Manage site features".



3. In the Nintex Workflow 2010™ section, click the "Activate" button.



4. After a short delay, the page will refresh and the status will become "Active"
5. If you activated the "Nintex Workflows 2010 Enterprise Reporting Web Parts" on the site collection and want to use the feature on this site, click "Activate" in the "Nintex Workflow 2010 Enterprise Reporting" section. This feature is only available for Enterprise version.

It is now possible to design and interact with Nintex Workflow 2010™.

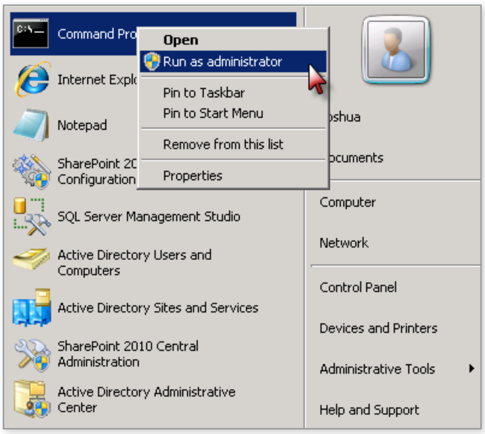
Appendix A

A

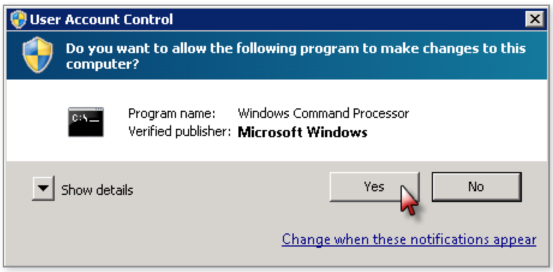
Notes on User Access Control (UAC)

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

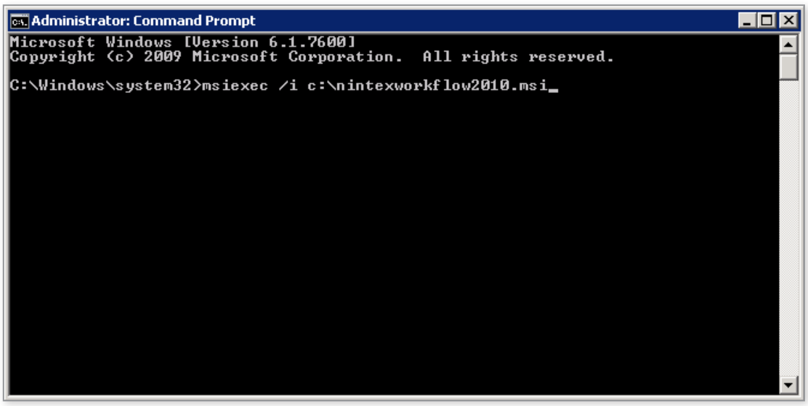
1. Click the start menu and right click on the Command Prompt option. Choose "Run as administrator".



2. Click the "Yes" button.



3. Type in the command "msiexec /i c:\nintexworkflow2010.msi".



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

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