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Introduction

This document describes the process to upgrade Nintex Workflow 2007 to Nintex Workflow 2010. It has two sections, one for a SharePoint "In Place" upgrade and the other for a SharePoint "Attach database" upgrade. The SharePoint method you use is your choice.

Before upgrading

If you are moving the database to a different server or database name, please refer to 'How to move a Nintex Workflow 2007 database' document available at http://connect.nintex.com/files/folders/tutorials/entry1213.aspx and ensure that steps are followed in the **Stage 2 - Update the references to the content databases** topic which explains how to update internal references to the old server name stored within the database.

In-place Upgrade method

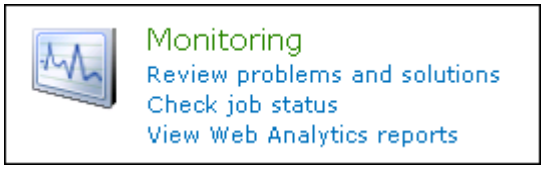
SharePoint State: SharePoint 2007 has been completely upgraded to SharePoint 2010.

Uninstall Nintex Workflow 2007 MSI

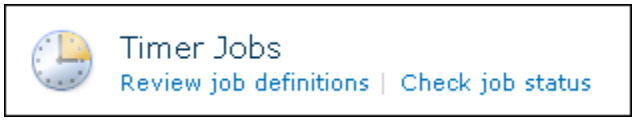
1. Log on to the server where the Nintex Workflow 2007 MSI was installed.
2. Open control panel.
3. Choose "Uninstall a program" ("Add remove programs" in earlier versions of Windows Server).
4. Find Nintex Workflow 2007 and uninstall it.

Disable workflow timer job

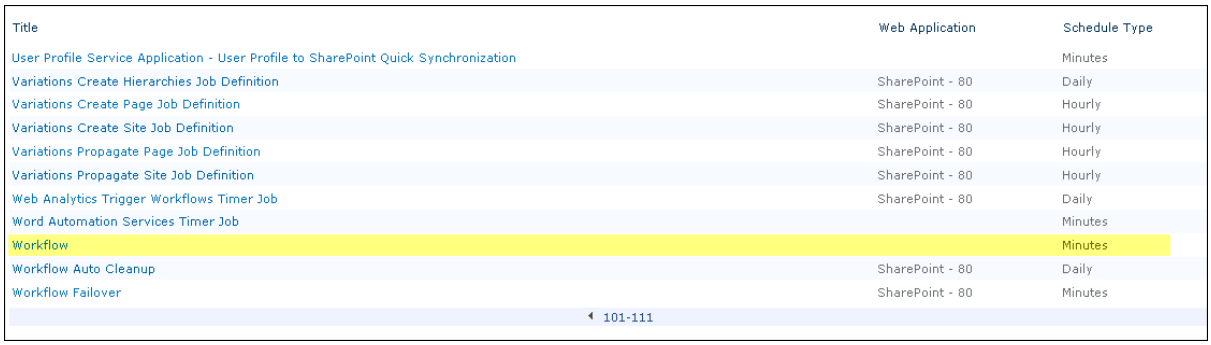
1. Browse to "Central Administration" -> "Monitoring".



2. In Timer Jobs section, click "Review job definitions".



3. Click on the job called "Workflow" (it may not be listed on the first page).



Title	Web Application	Schedule Type
User Profile Service Application - User Profile to SharePoint Quick Synchronization		Minutes
Variations Create Hierarchies Job Definition	SharePoint - 80	Daily
Variations Create Page Job Definition	SharePoint - 80	Hourly
Variations Create Site Job Definition	SharePoint - 80	Hourly
Variations Propagate Page Job Definition	SharePoint - 80	Hourly
Variations Propagate Site Job Definition	SharePoint - 80	Hourly
Web Analytics Trigger Workflows Timer Job	SharePoint - 80	Daily
Word Automation Services Timer Job		Minutes
Workflow		Minutes
Workflow Auto Cleanup	SharePoint - 80	Daily
Workflow Failover	SharePoint - 80	Minutes

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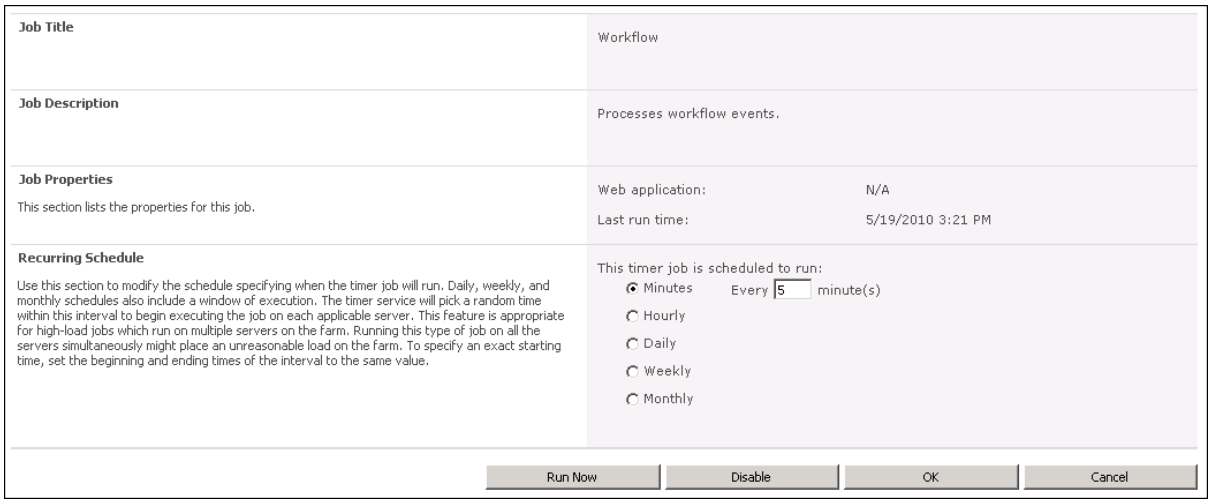
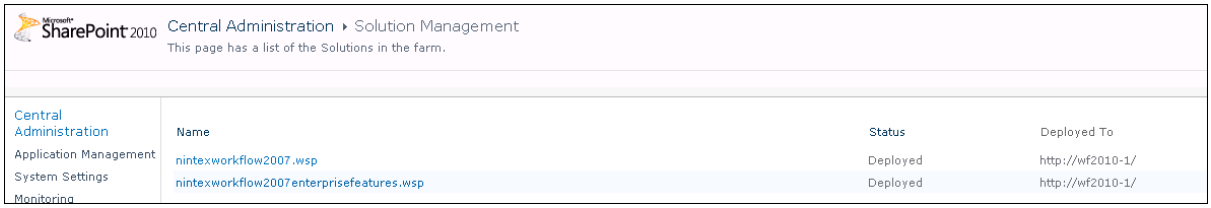
4. Click "Disable".



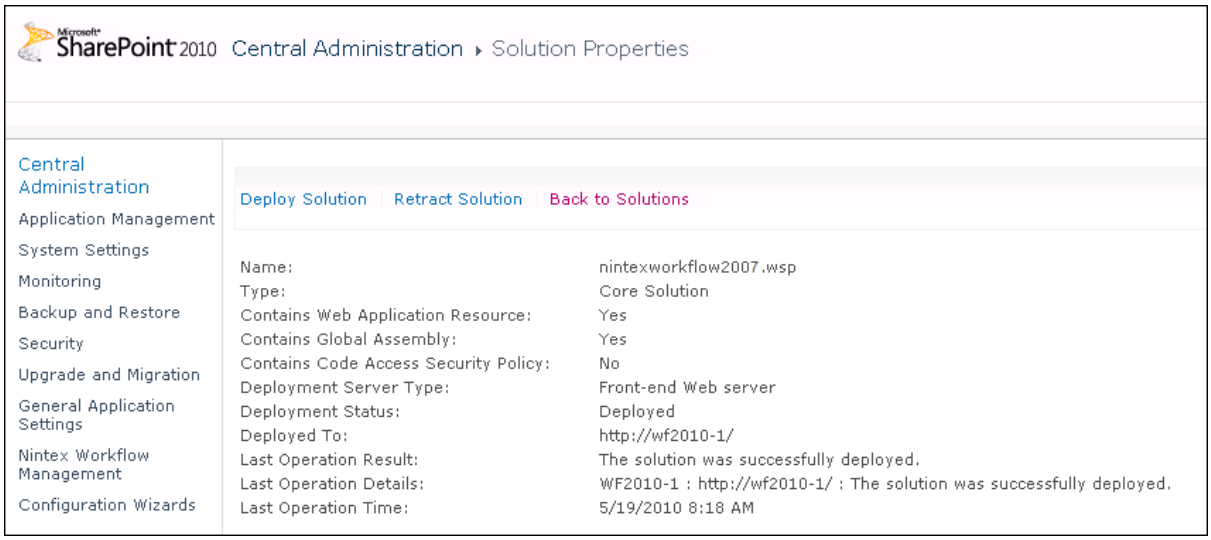
Remove Nintex Workflow 2007 solution packages

1. Browse to "System Settings" -> "Manage farm solutions".

2. Click on "NintexWorkflow2007.wsp".

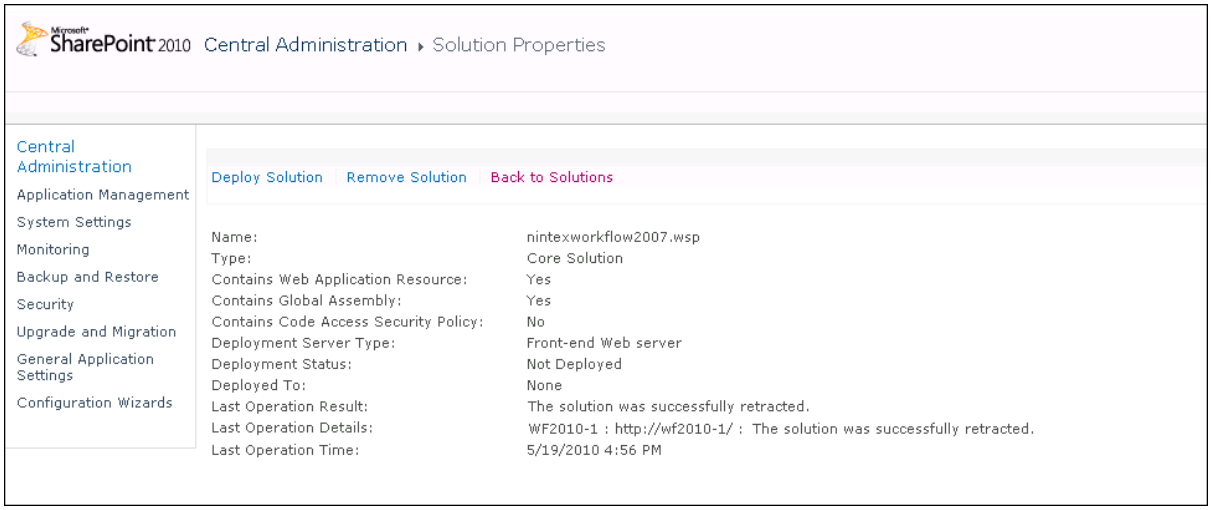


3. Select "Retract Solution".



4. Wait for the solution to be retracted.

5. Click on "NintexWorkflow2007.wsp" again.
6. Select "Remove Solution".



7. Repeat steps 2 – 6 as necessary for "NintexWorkflow2007EnterpriseFeatures.wsp".

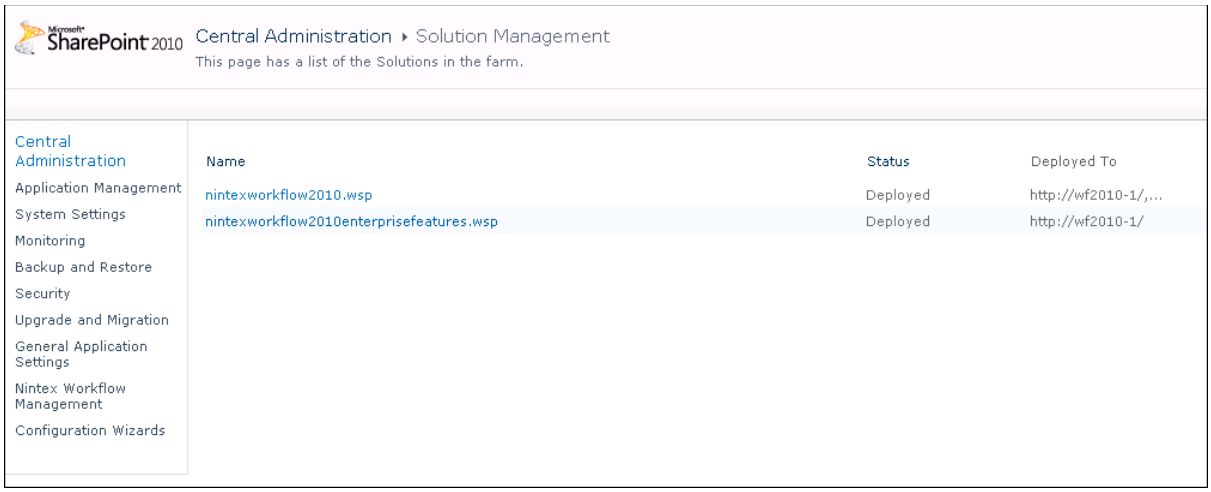
Install Nintex Workflow 2010

1. Install Nintex Workflow 2010 by double clicking the "NintexWorkflow2010.msi" and following the prompts.

2. Browse to "System Settings" -> "Manage farm solutions" (this page should open automatically after the install is complete) and deploy the "NintexWorkflow2010.wsp" solution.

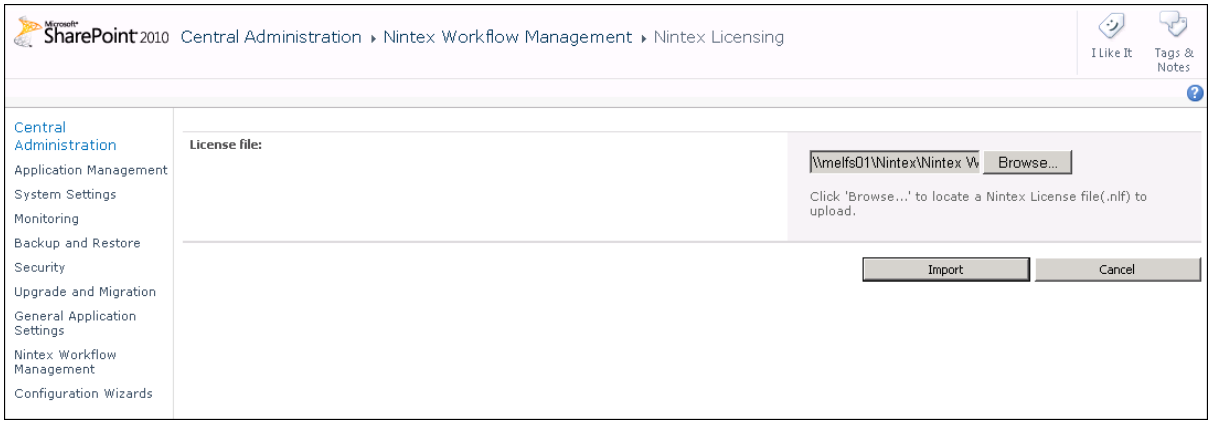
   NOTE: If the page lists the solution as "Deploying" with a timestamp, refresh the page until the solutions is listed as "Deployed". If the page says "Service Unavailable", then IIS is restarting. Refresh the page until it displays.

3. Repeat step 2 as necessary for "NintexWorkflow2010EnterpriseFeatures.wsp"

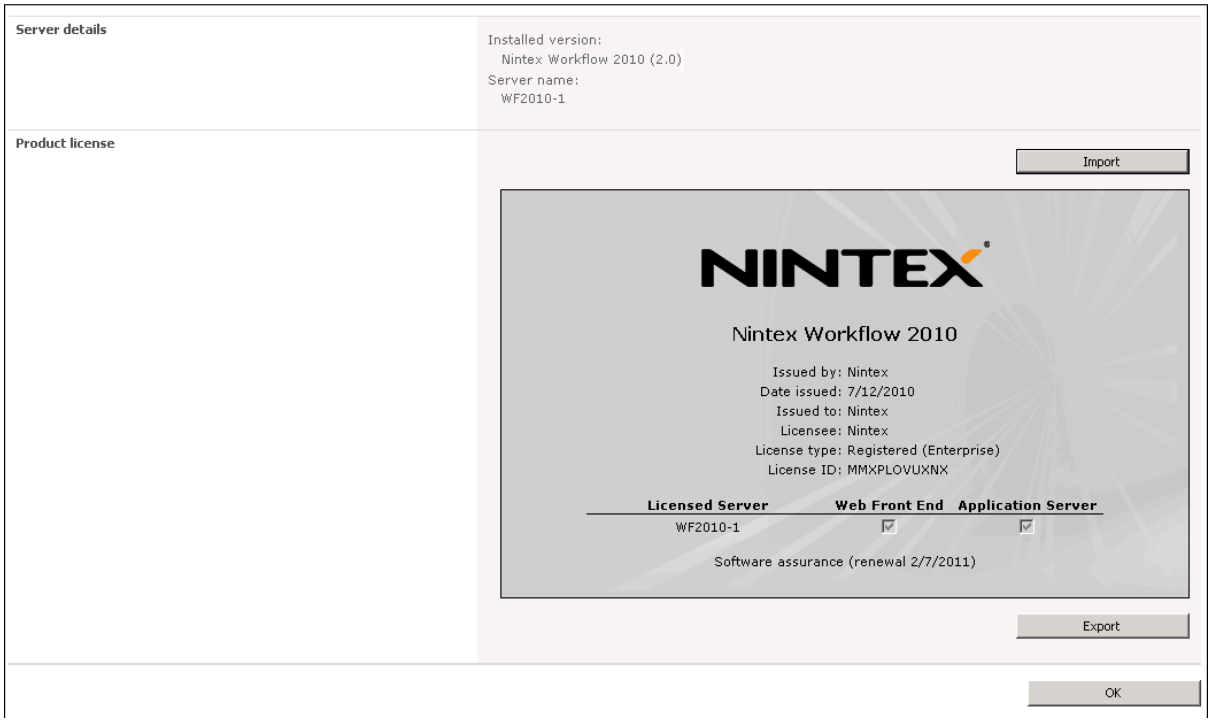


4. Browse to "Nintex Workflow Management" -> "Licensing".

5. Click "Import" and then "Browse" to select Nintex Workflow 2010 License file.

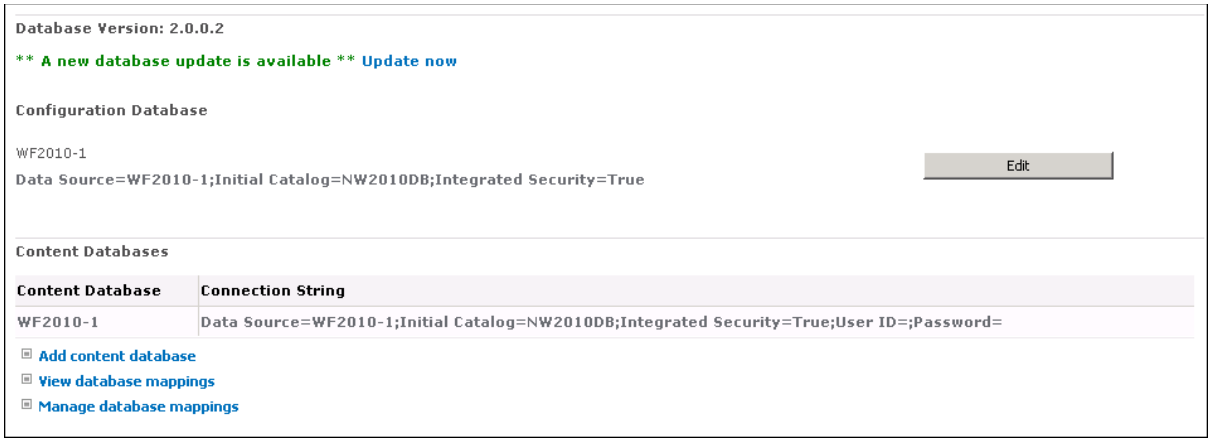


6. Click "Import" to Import the license.



7. Browse to "Nintex Workflow Management" -> "Database setup".

8. Click the "Update now" link.



9. Browse to "Nintex Workflow Management" -> "Web Application activation".

10. Click the "Activate" button for all web applications that use Nintex Workflow.

11. Browse to "Nintex Workflow Management" -> "Manage allowed actions".

12. Enable any new workflow actions.

This list of workflow actions is the default for this farm.

Add an action

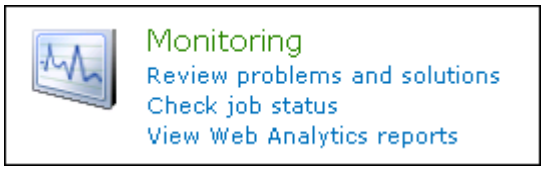
	Category	Name	Description
☑	Integration	Call web service	Send or receive data using a web service
☑	Integration	Execute SQL	Execute an SQL command
☑	Integration	Query BCS	Retrieve data from a Business Connectivity Services data source
☑	Integration	Query Excel Services	Retrieve data from an Excel spreadsheet 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 XML	Retrieve XML from a specified source, modify and save to a specified location
☑	Integration	Web request	Send or receive information using a HTTP request
☐	Libraries and lists	Capture document set version	Create a version of the document set
☑	Libraries and lists	Check in item	Check in an item in a library
☑	Libraries and lists	Check out item	Check out an item in a library
☑	Libraries and lists	Copy item	Copy an item from a source list into a destination list
☑	Libraries and lists	Copy to file share	Copy the current item to a network file share
☑	Libraries and lists	Copy to SharePoint	Copy the current item to a library in another SharePoint site
☑	Libraries and lists	Create item	Create an item in the current SharePoint site
☑	Libraries and lists	Create item in another site	Create an item in the current SharePoint farm
☑	Libraries and lists	Create list	Create a list in a SharePoint site
☑	Libraries and lists	Declare as record	Declare the current item as a record
☑	Libraries and lists	Delete item	Delete an item from a list
☐	Libraries and lists	Delete multiple items	Delete multiple items from a list
☑	Libraries and lists	Discard check out	Check in a file that is currently checked out discarding any changes made
☑	Libraries and lists	Query list	Retrieve data from a list
☐	Libraries and lists	Send document set to repository	Submit the current document set to a records center
☐	Libraries and lists	Send document to repository	Submit the current document to a records center
☑	Libraries and lists	Set approval status	Set the approval status of the current item
☑	Libraries and lists	Set document set approval status	Set the approval status of the current document set

13. Perform an IISRESET on each web front end server.

14. Restart the "SharePoint 2010 Timer" service on each web front end server.

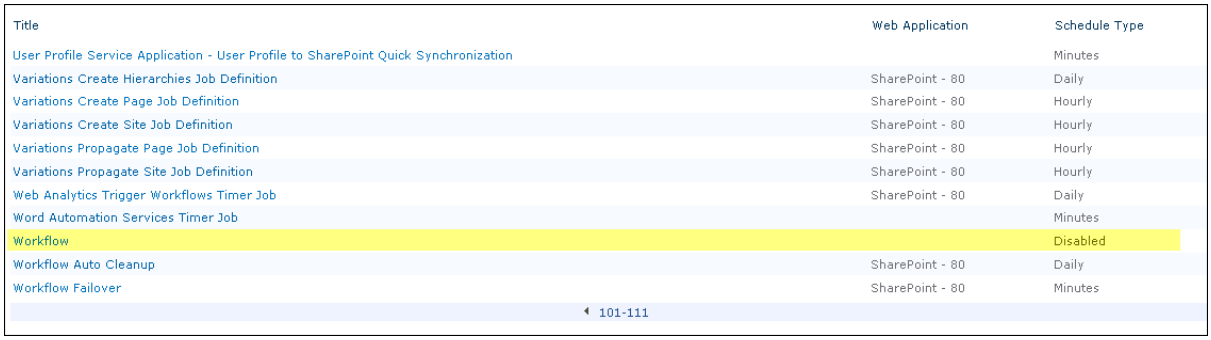
Reactivate the workflow timer job

1. Browse to "Central Administration" -> "Monitoring".



2. In the “Timer Jobs” section, click "Review job definitions".

3. Click on the job called "Workflow".



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Variations Propagate Page Job Definition	SharePoint - 80	Hourly
Variations Propagate Site Job Definition	SharePoint - 80	Hourly
Web Analytics Trigger Workflows Timer Job	SharePoint - 80	Daily
Word Automation Services Timer Job		Minutes
Workflow		Disabled
Workflow Auto Cleanup	SharePoint - 80	Daily
Workflow Failover	SharePoint - 80	Minutes

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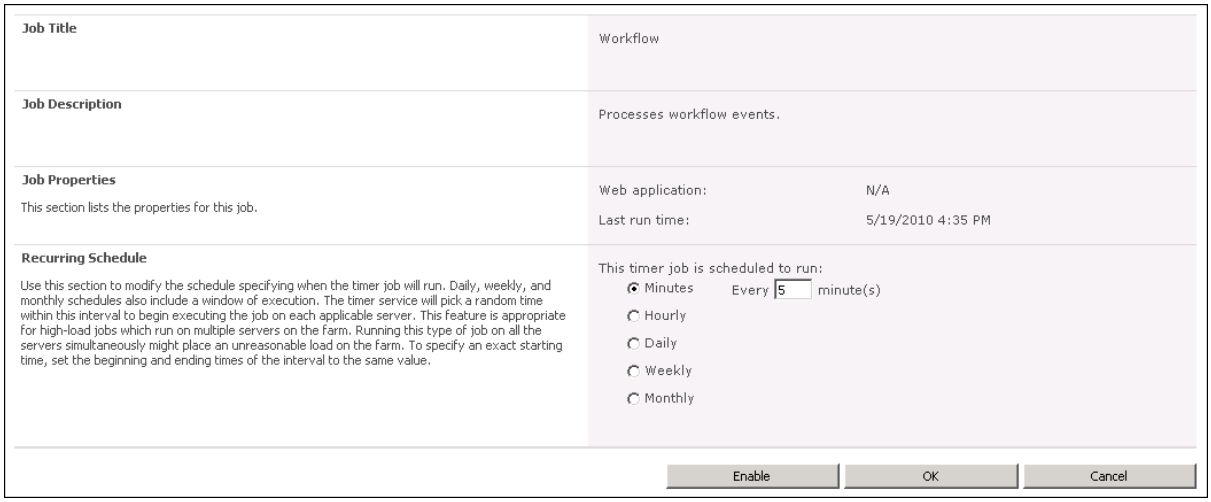
4. Click "Enable".



Database Attach Upgrade method

SharePoint State:

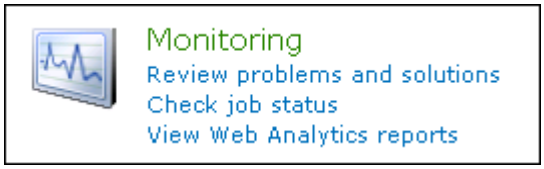
- SharePoint 2010 installed and configured.
- SharePoint 2007 content databases **not** yet attached.
- The web application that will host the 2007 content has been created.

Prepare your SharePoint 2010 environment

In preparation for the upgrade to Nintex Workflow 2010, all services that host/interoperate with the SharePoint workflow engine must be stopped.

Disable workflow timer job

1. Browse to "Central Administration" -> "Monitoring".



2. In the “Timer Jobs” section, click "Review job definitions".

3. Click on the job called "Workflow" (it may not be listed on the first page).

Title	Web Application	Schedule Type
User Profile Service Application - User Profile to SharePoint Quick Synchronization		Minutes
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Variations Propagate Page Job Definition	SharePoint - 80	Hourly
Variations Propagate Site Job Definition	SharePoint - 80	Hourly
Web Analytics Trigger Workflows Timer Job	SharePoint - 80	Daily
Word Automation Services Timer Job		Minutes
Workflow		Minutes
Workflow Auto Cleanup	SharePoint - 80	Daily
Workflow Failover	SharePoint - 80	Minutes

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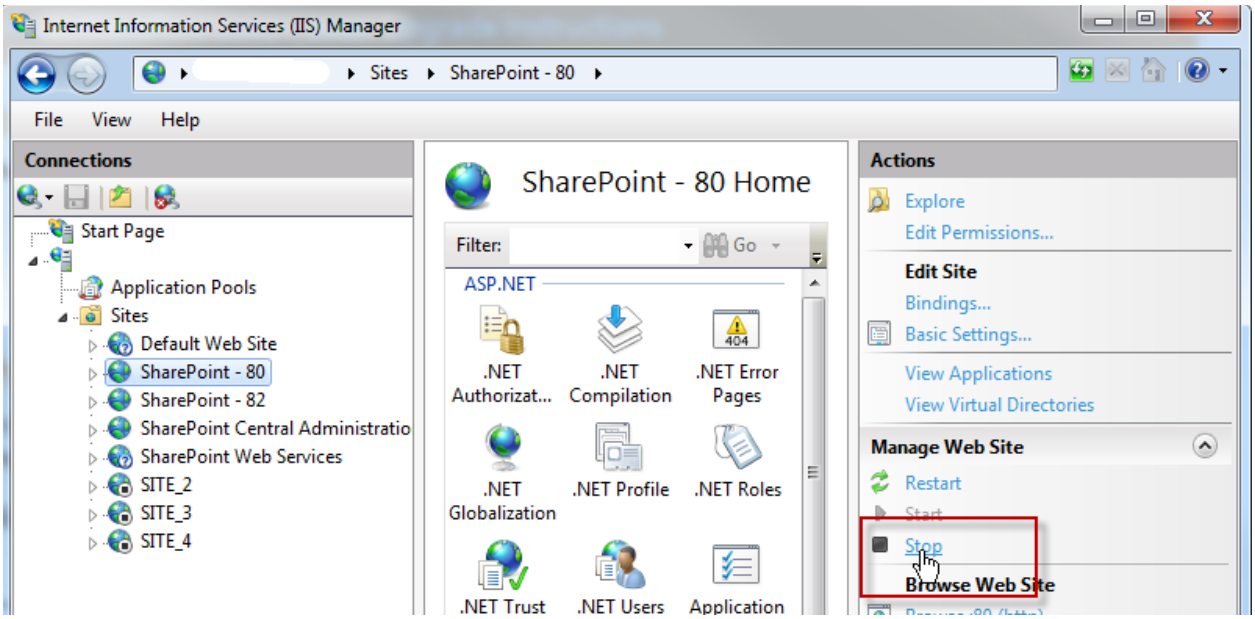
4. Click "Disable".

Job Title	Workflow
Job Description	Processes workflow events.
Job Properties This section lists the properties for this job.	Web application: N/A Last run time: 5/19/2010 3:21 PM
Recurring Schedule Use this section to modify the schedule specifying when the timer job will run. Daily, weekly, and monthly schedules also include a window of execution. The timer service will pick a random time within this interval to begin executing the job on each applicable server. This feature is appropriate for high-load jobs which run on multiple servers on the farm. Running this type of job on all the servers simultaneously might place an unreasonable load on the farm. To specify an exact starting time, set the beginning and ending times of the interval to the same value.	This timer job is scheduled to run: (•) Minutes Every 5 minute(s) ( ) Hourly ( ) Daily ( ) Weekly ( ) Monthly

Run Now | Disable | OK | Cancel

Stop all web applications except central administration

1. Open IIS and stop ALL SharePoint Web Applications with the exception of Central Administration.



NOTE: Ensure you perform this step on all servers in your SharePoint farm.

Update the SQL connection string(s) in the Nintex configuration database (optional)

If the Nintex Workflow(s) database that you are upgrading has been moved to a different server or is a copy of your 2007 database, you must perform the following steps:

1. Open the Nintex Workflow configuration database in SQL Management Studio.

2. Open the table called “Databases”.

3. Right click on the table and click “Edit top 200 rows”.

4. You will see the content database details listed. You must update the *ServerName* and *DatabaseName* column to point to your new location and submit the change.

Proceeding with the upgrade without following the above steps will cause any current Nintex Workflow 2007 environment to stop working as the references in the database being attached will still refer to the Nintex Workflow 2007 environment it was previously connected to.

Install Nintex Workflow 2010

1. Install Nintex Workflow 2010 (refer to Nintex Workflow 2010 Installation Guide, Steps 1.1 - 1.4).

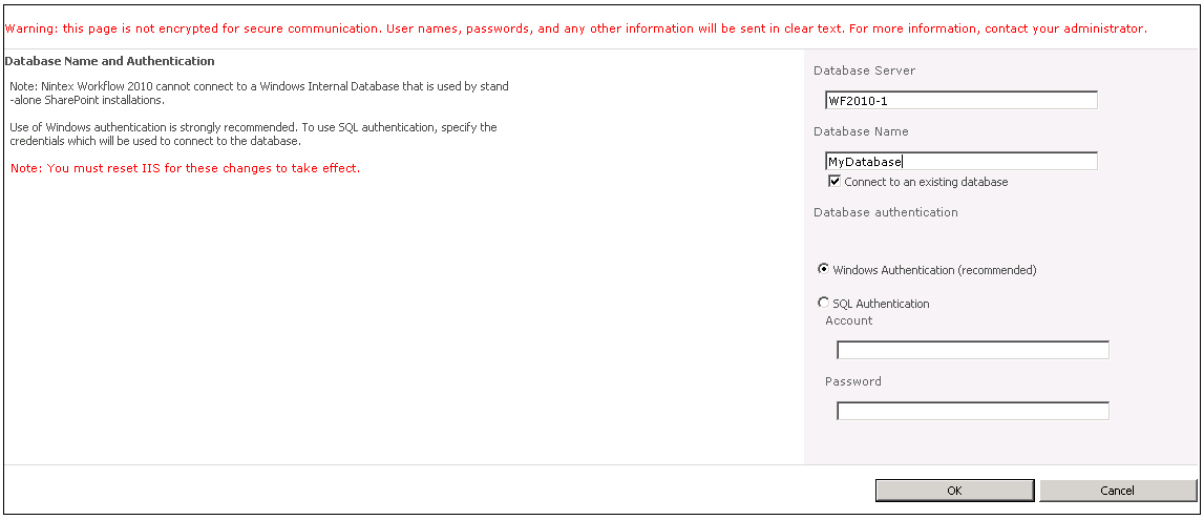
2. Browse to "Nintex Workflow Management" -> "Database setup".

3. Click the "Create" button.

4. Enter the details of the existing Nintex Workflow database.

IMPORTANT: Ensure you have completed the pre-requisite step entitled “Update the SQL connection string(s) in the Nintex configuration database”.

5. Tick the "Connect to existing database" option.



Clicking OK on the above page will upgrade the Nintex configuration database to 2010 and any attached Nintex content databases. The database setup page should now show the upgraded configuration database, and at least one Nintex content database:

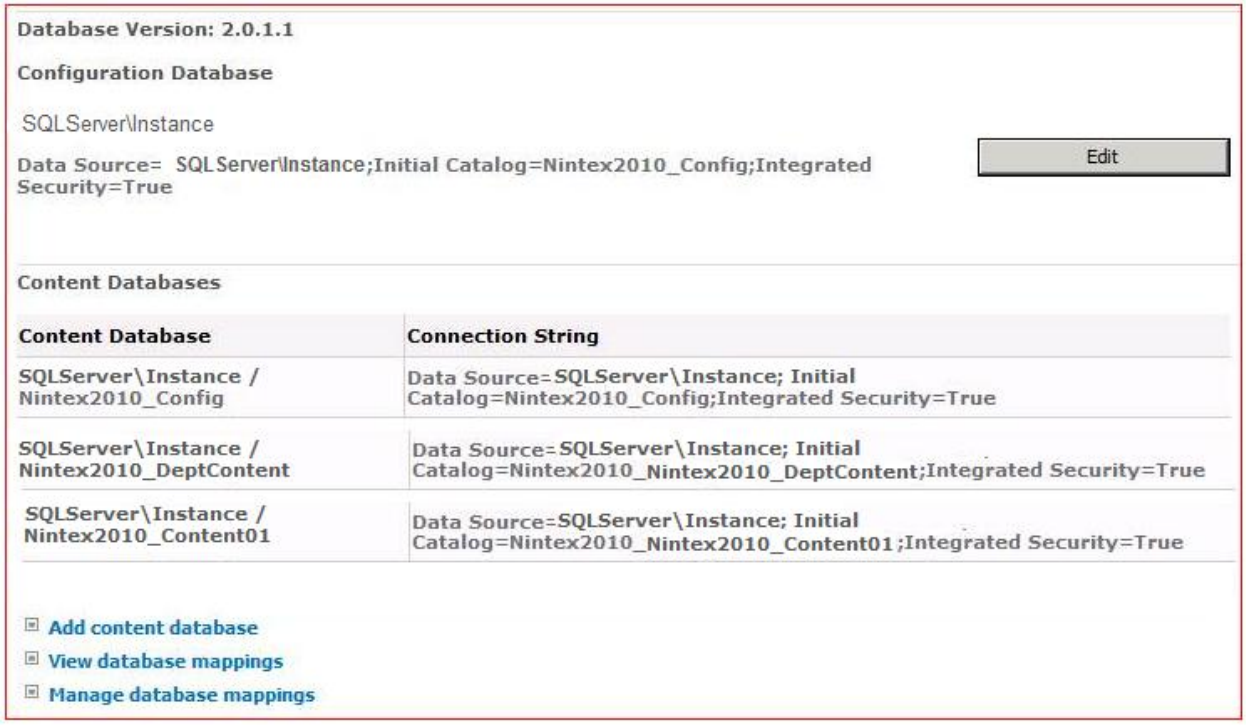
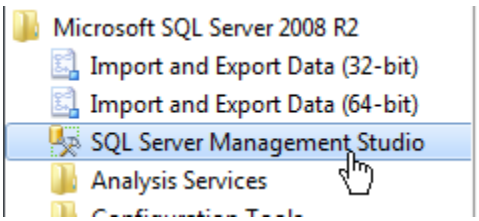


***Figure 1**. (Database Setup page after connecting to a Nintex Workflow configuration database)*

Once you have performed this step, it is recommended to confirm that ALL Nintex databases have been upgraded to the latest database schema version:

5.1 On a server that has SQL management tools installed, launch Microsoft SQL Server Management Studio.



5.2 For each content database listed on the Database Setup page, run the following SQL query:

```
SELECT [Version]
FROM [Nintex2010_Config].[dbo].[Version]
```

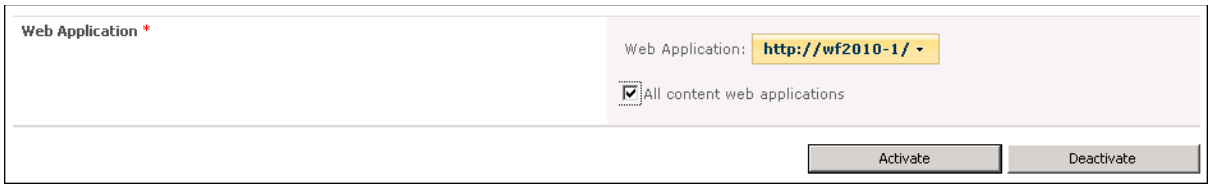
Ensure that the Version value matches the version listed on the Database Setup Page (Figure 1). If the version does not match, run the following command to force the content databases to upgrade:

```
NWAdmin.exe -o UpgradeDatabases -force
```

Full NWAdmin documentation is available from:
http://connect.nintex.com/files/folders/technical_and_white_papers_nw2010/entry12004.aspx

6. Browse to "Nintex Workflow Management" -> "Web Application activation".

7. Click the “Activate” button for all web applications that use Nintex Workflow.



8. Browse to "Nintex Workflow Management" -> "Manage allowed actions".

9. Enable workflow actions.

This list of workflow actions is the default for this farm.

Add an action

	Category	Name	Description
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☑	Libraries and lists	Create item in another site	Create an item in the current SharePoint farm
☑	Libraries and lists	Create list	Create a list in a SharePoint site
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☐	Libraries and lists	Send document to repository	Submit the current document to a records center
☑	Libraries and lists	Set approval status	Set the approval status of the current item
☑	Libraries and lists	Set document set approval status	Set the approval status of the current document set

10. Now attach your SharePoint 2007 content database as following Microsoft's guidance.

Restart all services that were stopped in the pre-installation phase

1. Restart all web applications that were stopped in IIS.
2. Enable the Workflow timer job in Central Administration.
3. Restart the SharePoint 2010 timer service in Server Manager to ensure any cached data pertaining to Nintex Workflow is purged.