Nintex Workflow 2007 – 2010 Upgrade Instructions

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1 Introduction

This document describes the process to upgrade Nintex Workflow 2007 to Nintex Workflow 2010. It has two sections:

- SharePoint "In Place" upgrade
- SharePoint "Attach database" upgrade

The SharePoint method you use is your choice.

This guide assumes that the Nintex Workflow 2007 is version 1.13.

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2 In-place Upgrade method

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

2.1 Before Upgrading

2.1.1 Moving Database

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.

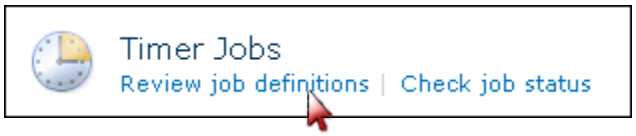
2.2 Uninstall Nintex Workflow 2007 MSI

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.

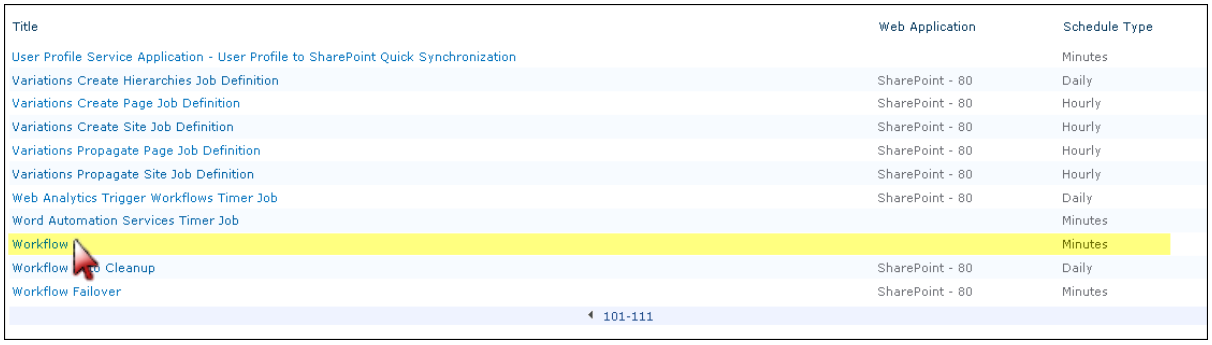
2.3 Disable workflow timer job

1. Browse to "Central Administration", click on "Monitoring".

2. In Timer Jobs section, click on "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 Task Cleanup	SharePoint - 80	Daily
Workflow Failover	SharePoint - 80	Minutes
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4. Click the "Disable" button.

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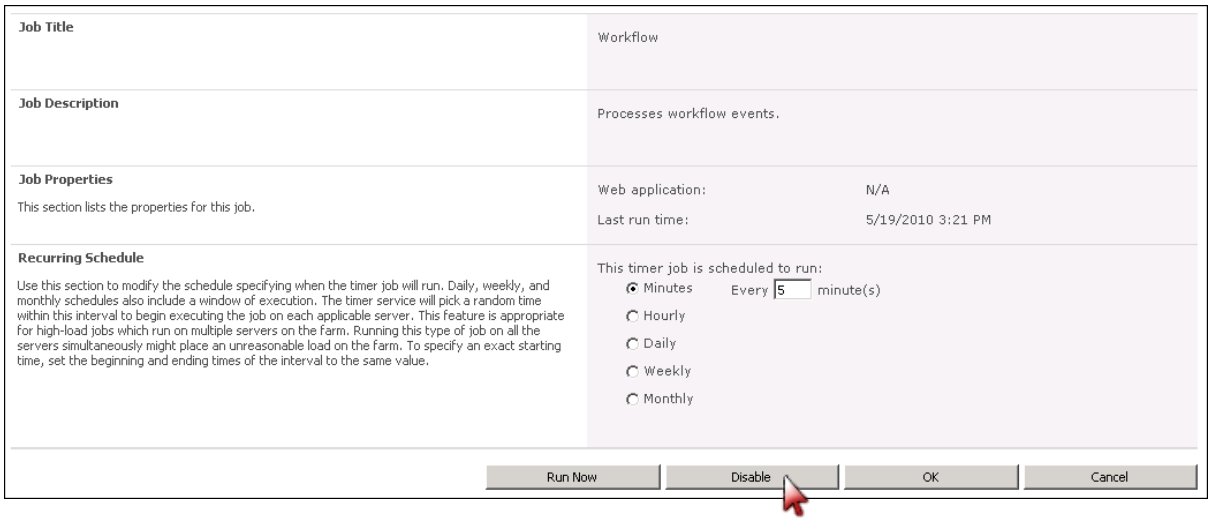

2.4 Remove Nintex Workflow 2007 solution packages

1. Browse to "System Settings", click on "Manage farm solutions".

2. Click on "NintexWorkflow2007.wsp".

3. Select "Retract Solution".

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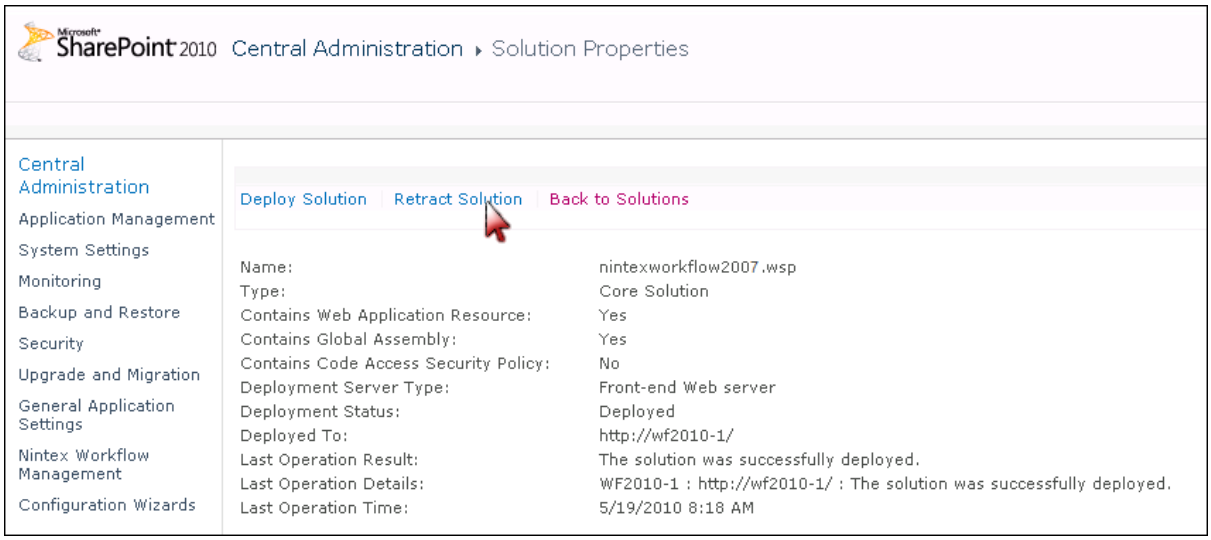
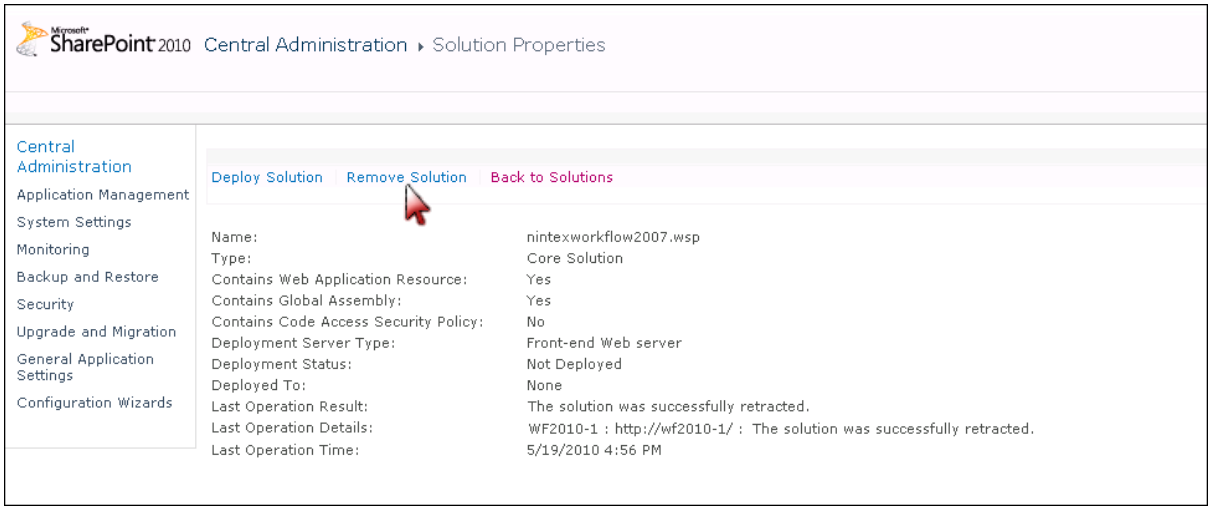


4. Wait for the solution to be retracted.

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



7. Repeat steps 2 – 6 as necessary for "NintexWorkflow2007EnterpriseFeatures.wsp" and “NintexWorkflow2007LiveConnector.wsp”.

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2.5 Install Nintex Workflow 2010

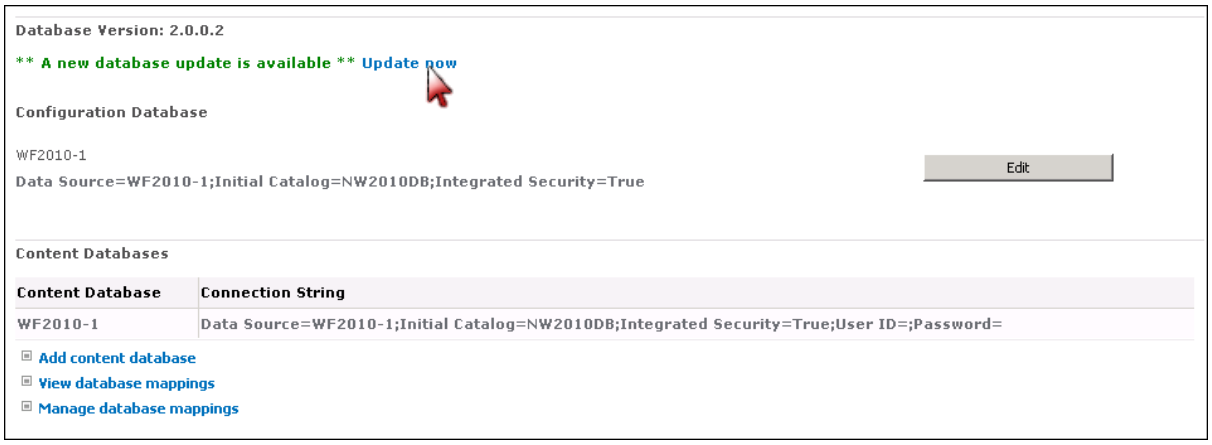
1. Run the Nintex Workflow 2010 installer. Refer to the Nintex Workflow 2010 Installation Guide and complete the following chapters in the Installation Guide:
    - 1.1 Run the Installer
    - 1.2 Deploy the Solution Package
    - 1.3 Installing Nintex Workflow 2010 Enterprise Features (optional)
    - Deploy “nintexlivecore.wsp” if using Nintex Live and it is not yet deployed.

2.6 Import Nintex Workflow 2010 License

1. Browse to "Nintex Workflow Management", click on "Licensing".
2. Click the "Import" button, followed by the "Browse…" button.
3. Select the Nintex Workflow 2010 license file.
4. Click the “Import” button.

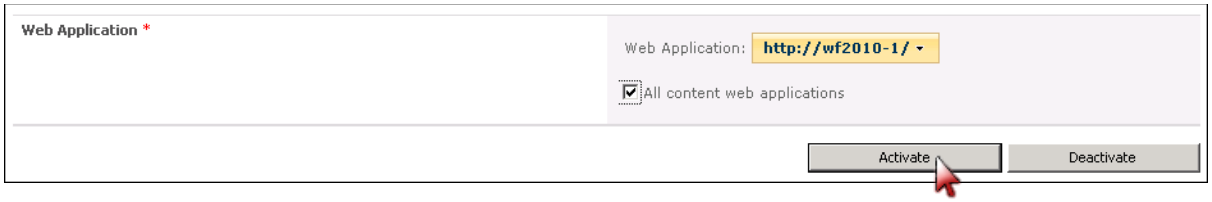
2.7 Update the Nintex Workflow Database

1. Browse to "Nintex Workflow Management", click on "Database setup".
2. A database update is available and will be indicated in green with an option to “Update now”. Click the "Update now" link.



2.8 Web Application Activation

1. Browse to "Nintex Workflow Management", click on "Web Application activation".
2. Click the "Activate" button for all web applications that use Nintex Workflow.



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2.9 Enable Nintex Workflow 2010 Workflow Actions

1. Browse to "Nintex Workflow Management", click on "Manage allowed actions".
2. 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

3. Perform an IISRESET on each web front end server.
4. Restart the "SharePoint 2010 Timer" service on each web front end server.

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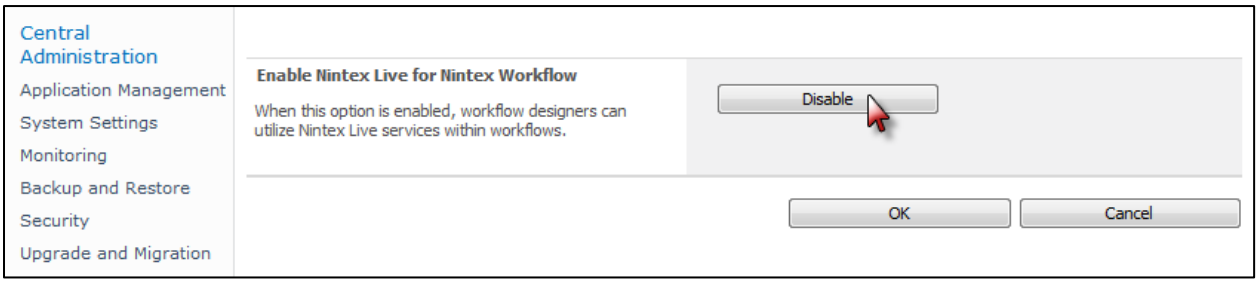
2.10 Re-enable Nintex Live

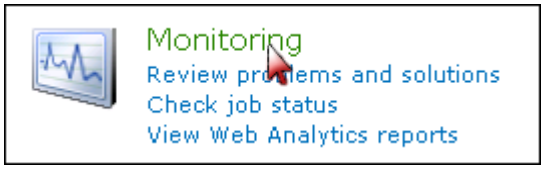
1. Browse to “Nintex Workflow Management”, click on “Live settings”.
2. In the “Enable Nintex Live for Nintex Workflow”, click on the “Disable” button.



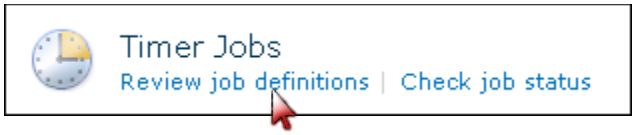
3. Once the “Enable” button is available, click on the “Enable” button.
4. Click “OK”.

2.11 Reactivate the workflow timer job

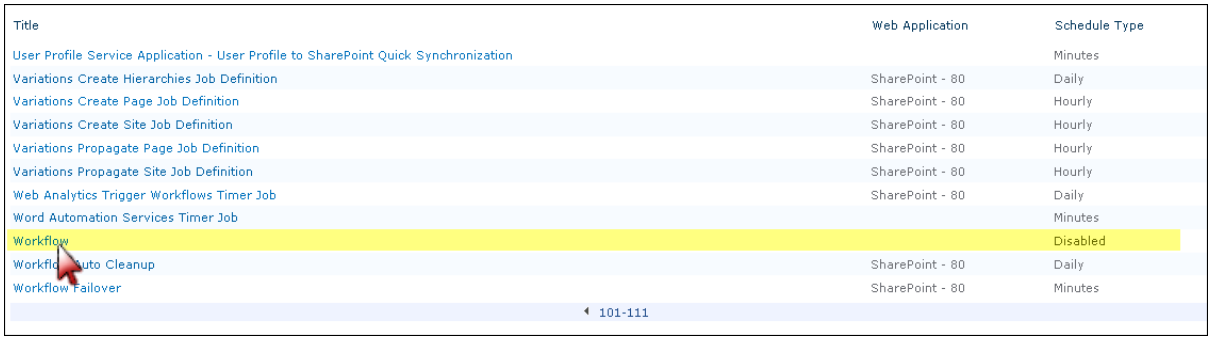
1. Browse to "Central Administration", click on "Monitoring".



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



3. Click on the job called "Workflow".



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		Disabled
Workflow Auto Cleanup	SharePoint - 80	Daily
Workflow Failover	SharePoint - 80	Minutes

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4. Click the "Enable" button.

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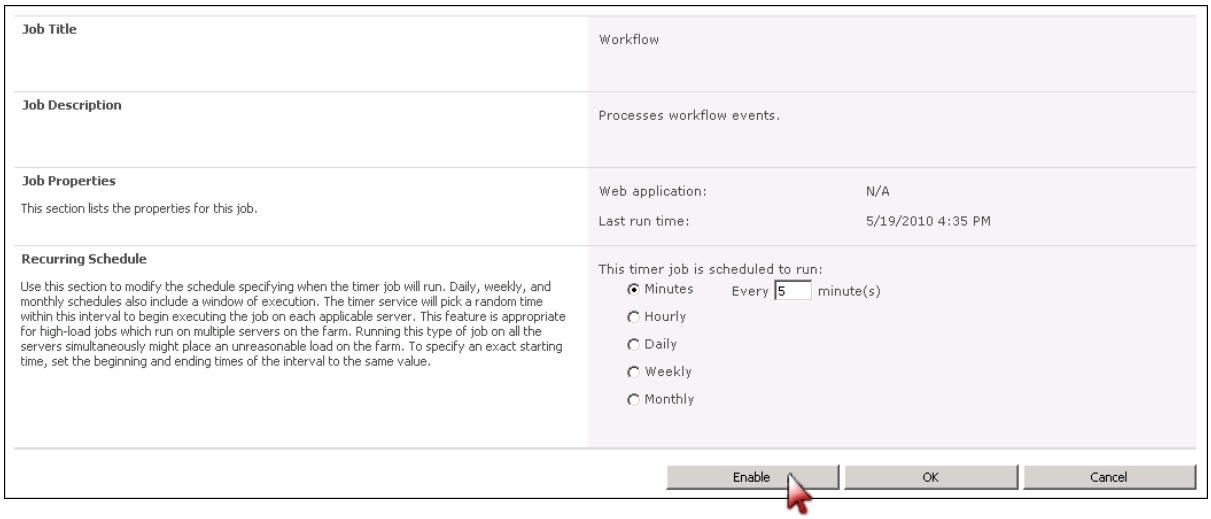

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3 Database Attach Upgrade method

SharePoint State:

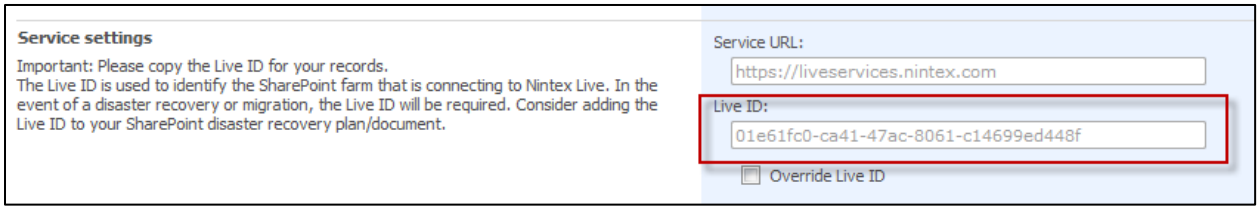
- SharePoint 2010 installed and configured.
- SharePoint 2007 content databases **not** yet attached.
- The web application that will host the 2007 content has been created.

3.1 Before Upgrading

3.1.1 Nintex Live

Important: If Nintex Live is in use, take note of the Live ID.

1. Browse to “Application Management”, in the “Nintex Workflow Management” section, click on “Live settings”.
2. Note the Live ID. This Live ID will need to be specified in the SharePoint 2010 environment.



3. Click “OK”.

3.2 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.

3.2.1 Disable workflow timer job

1. Browse to "Central Administration", click on "Monitoring".

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

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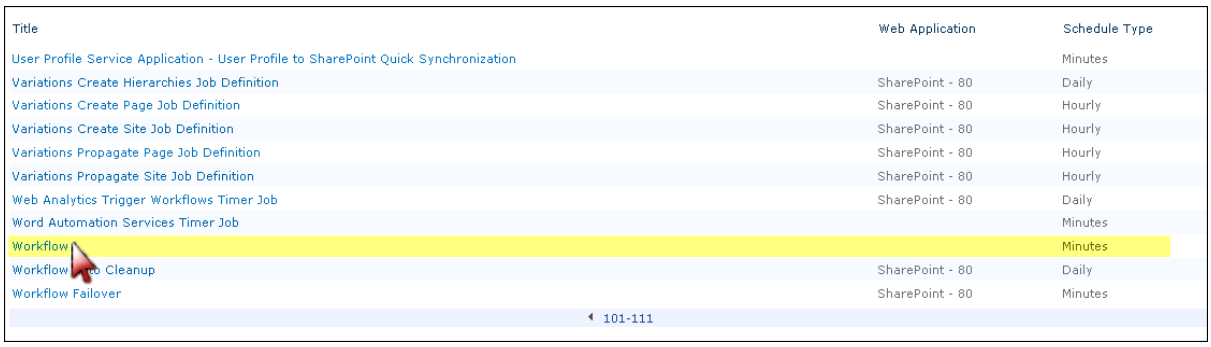
3. Click on the job called "Workflow" (it may not be listed on the first page).



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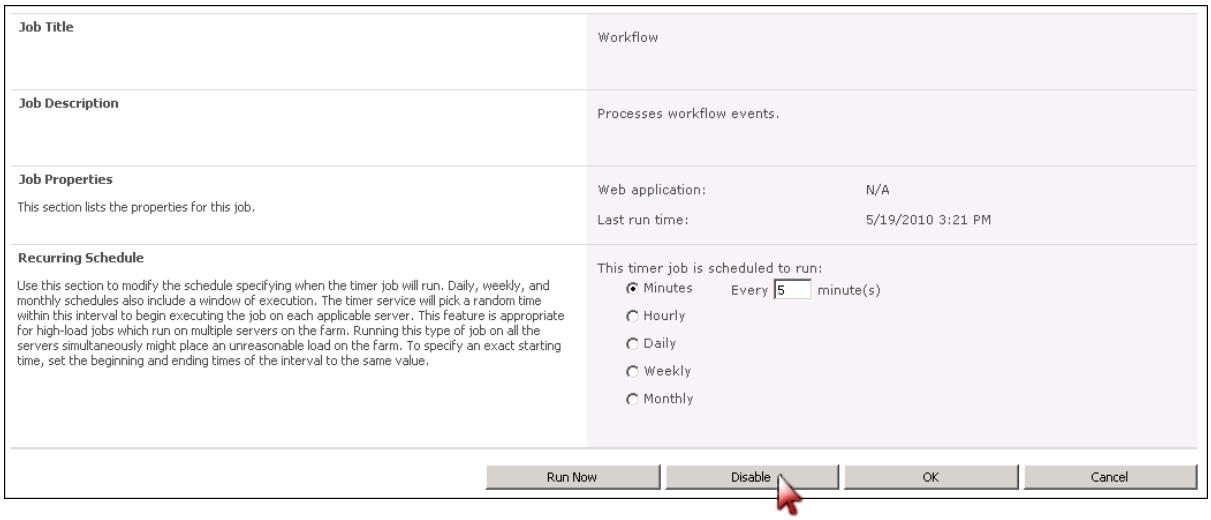
Variations Propagate Page Job Definition	SharePoint - 80	Hourly
Variations Propagate Site Job Definition	SharePoint - 80	Hourly
Web Analytics Trigger Workflows Timer Job	SharePoint - 80	Daily
Word Automation Services Timer Job		Minutes
Workflow		Minutes
Workflow Task Cleanup	SharePoint - 80	Daily
Workflow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

101-111

4. Click the "Disable" button.



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

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3.3 Install Nintex Workflow 2010

1. Run the Nintex Workflow 2010 installer. Refer to the Nintex Workflow 2010 Installation Guide and complete the following chapters in the Installation Guide:
    - 1.1 Run the Installer
    - 1.2 Deploy the Solution Package
    - 1.3 Installing Nintex Workflow 2010 Enterprise Features (optional)
    - 1.4 Importing the License
    - Nintex Live (Optional)

3.4 Nintex Workflow Configuration Database

3.4.1 Using a new configuration database

1. Browse to "Nintex Workflow Management", click on "Database setup".
2. Click the “Create” button in “Configuration Database”.
3. Enter the name of your database server and database name.
4. Click “OK”.

Note: A content database is created automatically. If the content database is not required, please follow the steps listed in step 6 of “Using an existing configuration database” to remove the reference.

5. If using Nintex Live, add any Nintex Live services that were used in the 2007 environment using the Nintex Live Catalog. To add a Nintex Live service:
    a. Navigate to “Managed allowed actions”, in the Ribbon, click on “Catalog”.
    b. Select the Nintex Live service(s), click “Add”.
    c. Click “OK”.

Note: If a Nintex Live service was used in Nintex Workflow 2007, ensure that the Nintex Live service is also added in the 2010 environment; else an error message will be displayed when the content databases are attached.

3.4.2 Using an existing configuration database

In the SharePoint 2007 environment:

1. Stop the “Windows SharePoint Services Timer” service. To stop the service:
    a. Open the “Start Menu”, select “Run” and type “Services.msc”.
    b. Locate the service. Right-click on the service and select “Stop”.
2. Run “NWAdmin.exe –o DetachDatabase –serverName <myservername> -databaseName <mydatabasename>”. To run the NWAdmin command:
    a. Navigate to the “Start Menu” and click on “Command Prompt” option.
    b. Type the following: cd “C:\Program Files (x86)\Nintex\Nintex Workflow 2007”
    c. Type the following: NWAdmin.exe –o DetachDatabase –serverName <myservername> -databaseName <mydatabasename>
3. Backup the database (using “Microsoft SQL Server Management Studio”).

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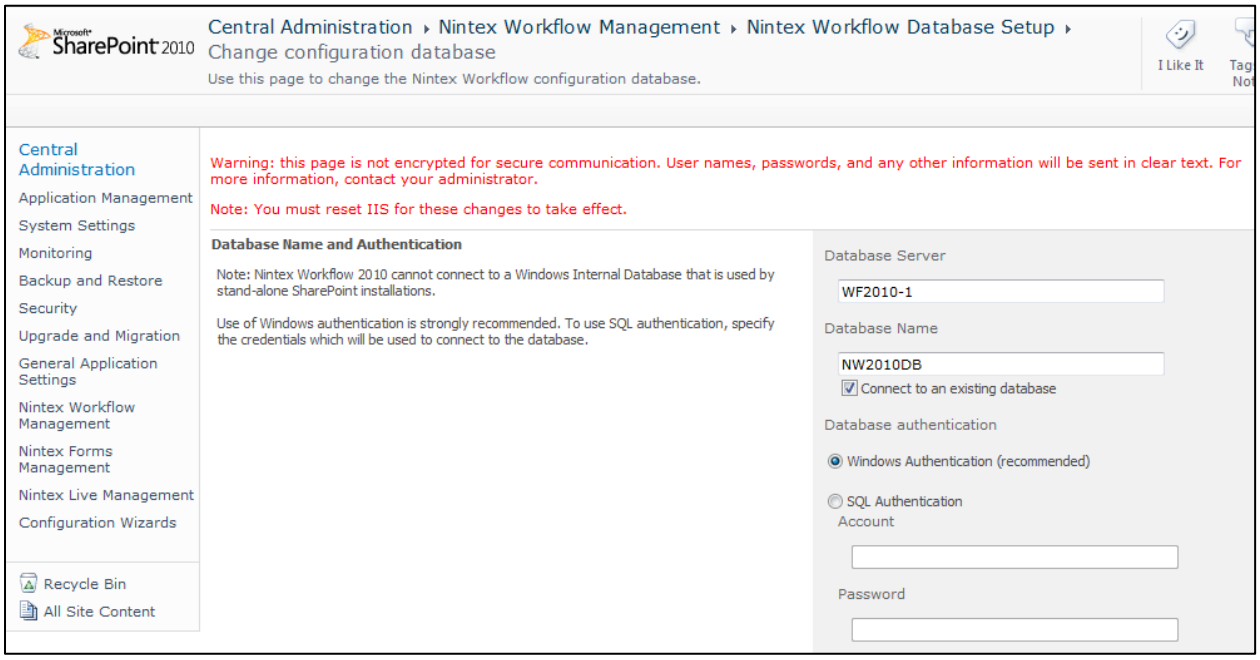
4. Start the “Windows SharePoint Services Timer”. To start the service:
    a. Open the “Start menu”, select “Run” and type “Services.msc”.
    b. Locate the service. Right-click on the service and select “Start”.

In the SharePoint 2010 environment:

5. Restore the database that was backed up in step 3 to the 2010 location (using “Microsoft SQL Server Management Studio”).
6. Execute “_PrepareForNewEnvironment” stored procedure.
    a. Launch “Microsoft SQL Server Management Studio” and open (expand) the restored database.
    b. Expand “Programmability” folder, expand the “Stored Procedures” folder.
    c. Right-click on the listing for “_PrepareForNewEnvironment” and choose “Execute Stored Procedure…”.
    d. In the opened dialog, click the “OK” button.

    Note: This stored procedure deletes existing references to content databases and Nintex Live service requests. These references will be re-added as needed when existing content databases are reattached.

7. Navigate to Nintex Workflow Management and connect to the configuration database. To connect to an existing configuration database:
    a. Browse to "Nintex Workflow Management", click on "Database setup".
    b. Click the “Create” button in “Configuration Database”.
    c. Enter the name of your database server and existing configuration database name.
    d. Select the option “Connect to an existing database”.
    e. Click “OK”.



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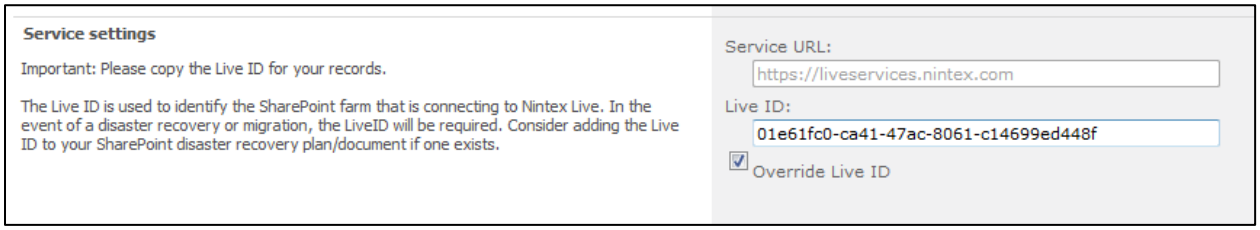
3.5 Enable Nintex Workflow 2010 Workflow Actions

1. Browse to "Nintex Workflow Management", click on "Manage allowed actions".
2. Enable any new workflow actions.

3.6 Restoring the Live ID

1. Browse to “Nintex Live Management”, click on “Connection settings”.
2. Select the option “Override Live ID” and replace it with the Live ID noted in the SharePoint 2007 environment before the upgrade.



3. Click “OK”.

3.7 Attach SharePoint 2007 content database

Attach your SharePoint 2007 content database as following Microsoft’s guidance.

3.8 Attaching Nintex Workflow Content Databases

Note: Content databases can be added gradually over time as SharePoint content databases are migrated. Ideally, there is a one-to-one mapping between a SharePoint database and a Nintex Workflow database.

A one-to-one mapping between SharePoint databases and Nintex Workflow can be achieved by using the NWAdmin –o MoveData command to split data from one database to many. Refer to the Nintex Workflow 2010 – NWAdmin.exe Operations document for more information.

Note: If the content database you are migrating is the same physical database as the configuration database, start from step 6 below to attach the database as a content database in SharePoint 2010.

In the SharePoint 2007 environment:

1. Stop the “Windows SharePoint Services Timer” service. To stop the service:
   a. Open the “Start Menu”, select “Run” and type “Services.msc”.
   b. Locate the service. Right-click on the service and select “Stop”.
2. Run “NWAdmin.exe –o DetachDatabase –serverName <myservername> -databaseName <mydatabasename>”. To run the NWAdmin command:
   a. Navigate to the “Start Menu” and click on “Command Prompt” option.
   b. Type the following: cd “C:\Program Files (x86)\Nintex\Nintex Workflow 2007”
   c. Type the following: NWAdmin.exe –o DetachDatabase –serverName <myservername> -databaseName <mydatabasename>

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3. Backup the database (using “Microsoft SQL Server Management Studio”).
4. Start the “Windows SharePoint Services Timer”. To start the service:
    a. Open the “Start menu”, select “Run” and type “Services.msc”.
    b. Locate the service. Right-click on the service and select “Start”.

In the SharePoint 2010 environment (Note: The Workflow job should be stopped at this point as instructed in “Disable workflow timer job”)

5. Restore the database that was backed up in step 3 to the 2010 location (using “Microsoft SQL Server Management Studio”).
6. Run “NWAdmin.exe –o AttachDatabase –serverName <myservername> –databaseName <mydatabaseName>”.
    a. Navigate to the “Start Menu” and click on “Command Prompt” option.
    b. Type the following: cd “C:\Program Files (x86)\Nintex\Nintex Workflow 2007”
    c. Type the following: NWAdmin.exe –o AttachDatabase –serverName <myservername> -databaseName <mydatabasename>

    Note: Why do I have to run a detach command before backing up the database?
    The detach command must be used to store some data from the 2007 environment that is not initially present in the content database. For example, when the DetachDatabase command is run, information on pending Nintex Live service requests is stored in the content database. When the AttachDatabase command is run in the 2010 environment, the data is extracted from the database into the environment. If these steps were not followed, the workflows waiting at a Nintex Live service request would never continue.

3.9 Web Application Activation

1. Browse to “Nintex Workflow Management”, click on “Web Application Activation”.
2. The default web application name should be automatically chosen. Click “Activate”.

3.10 Map SharePoint Content Database to Nintex Workflow Content Database

1. Configure a mapping for the SharePoint content database and the Nintex Workflow content database.
    a. Browse to "Nintex Workflow Management", click on "Database setup".
    b. Click on “Manage database mappings”.
    c. To map a “SharePoint Content Database” select the desired database in the “Map to Workflow Content Database” drop-down.

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

1. Enable the Workflow timer job in Central Administration.
2. Restart the SharePoint 2010 timer service in Server Manager to ensure any cached data pertaining to Nintex Workflow is purged.

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