IBM Business Process Manager
Version 7.5.0

IBM Business Process Manager for Microsoft Office Add-On Installation Guide

IBM

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Installing and configuring IBM Business Process Manager for Microsoft Office Add-On

IBM Business Process Manager for Microsoft Office Add-On is an integrated add-on for Microsoft Outlook in Microsoft Office. The installing and configuring topics help you install, configure, and troubleshoot IBM BPM for Microsoft Office.

Software and hardware requirements for installing IBM BPM for Microsoft Office

Make sure that your system meets the software and hardware requirements before installing IBM Business Process Manager for Microsoft Office Add-On.

Software requirements

The following table describes the software requirements for IBM BPM for Microsoft Office. In addition to the software requirements listed here, IBM® Business Process Manager V7.5 (Standard, Advanced, or Express) is required.

Table 1. Software requirements for installing IBM Business Process Manager for Microsoft Office Add-On

Component type	Component name
Operating systems	• Microsoft Windows® Server 2008 (32-bit and 64-bit) • Microsoft Windows® 7 (32-bit and 64-bit) • Microsoft Windows XP Professional SP2 • Microsoft Windows Vista (32-bit and 64-bit)
Client - Microsoft Office 2010	• Microsoft Office 2010 • Visual Studio Tools for the Microsoft Office system 4.0 Runtime Download website • Microsoft .NET 4.0 Download website
Client - Microsoft Office 2007	• Microsoft Office 2007 • 2007 Microsoft Office Primary Interop Assemblies, version 1.0 Download website • Visual Studio Tools for the Microsoft Office system 3.0 Runtime, version 9.0.21022.123 Download website • Microsoft .NET 3.5 Service Pack 1 Download website

Hardware requirements

The following hardware sizing suggestion is the minimum hardware required for running IBM BPM for Microsoft Office. The IBM Professional Services team can help you size your hardware based on more precise numbers of users, transactions, and data.

•

Intel® Pentium® 4, 2.0 GHz processor

- 512 MB RAM

- About 250 MB of free disk space for the application

Upgrading to IBM Business Process Manager for Microsoft Office Add-On 7.5

If you have previously installed Lombardi for Office 2003, Teamworks for Office 2003Teamworks for Office 2007, or IBM WebSphere Lombardi Edition for Office 7.2, follow these instructions to upgrade to IBM Business Process Manager for Microsoft Office Add-On.

Upgrading from Teamworks for Office 2007 or Lombardi for Office 7.2

You can upgrade from Teamworks for Office 2007 or Lombardi for Office 7.2 to IBM Business Process Manager for Microsoft Office Add-On.

Note: IBM BPM for Microsoft Office requires IBM Business Process Manager 7.5 (any edition). IBM BPM for Microsoft Office is not supported with IBM WebSphere Lombardi Edition for Office 7.2.

If you have previously installed Teamworks for Office 2007 or Lombardi for Office 7.2, and you are upgrading to IBM BPM for Microsoft Office, follow these upgrade steps.

If you have previously installed Lombardi for Office 2003, follow instructions in "Upgrading from Teamworks for Office 2003."

1. There are two methods for upgrading to IBM BPM for Microsoft Office: Interactive removal and installation, or silent removal and installation.
   - Interactive installation method: Double-click the **IBM-BPM-for-Office-Installer.exe** installer program file and follow the instruction to first uninstall a previous version and then install the latest version.
   - Silent installation method:
     a. Remove Teamworks for Office 2007 or Lombardi for Office 7.2 using the following command:
        ```
        msiexec /uninstall IBM-BPM-for-Office-Installer.msi /qn REMOVE=ALL
        ```
     b. Install IBM BPM for Microsoft Office using the instructions provided in the section "Running the silent installer" on page 4.
2. Start Microsoft Outlook.

If the upgrade is successful, an **IBM Business Process Manager** directory is created at the same hierarchical level as the Mailbox folder.

Note: By default, the IBM BPM for Microsoft Office installation sets the authentication mode to Integrated Authentication. If you are updating your installation, verify that the authentication setting is correct in your Microsoft Outlook client. For more information, see "Configuring integrated authentication in IBM BPM for Microsoft Office" on page 8.

Upgrading from Teamworks for Office 2003

You can upgrade from Lombardi for Office 2003 or Teamworks for Office 2003 to IBM Business Process Manager for Microsoft Office Add-On.

Before you begin the upgrade:
- Uninstall Lombardi for Office 2003 or Teamworks for Office 2003 before upgrading to Microsoft Office 2007 or Microsoft Office 2010.

- Make sure you have the correct version of IBM Business Process Manager installed. IBM BPM for Microsoft Office requires IBM Business Process Manager V7.5 or later. IBM BPM for Microsoft Office is not supported with IBM WebSphere Lombardi Edition for Microsoft Office Add-on 7.2 or previous versions.
- Ensure that there are no forms or tasks in the **Drafts** (if online) or **Outbox** (if offline) folders in Microsoft Outlook 2003 before upgrading to Microsoft Office 2007 or Office 2010. You must submit any pending forms before performing the upgrade steps. The offline Outbox folder is not part of IBM BPM for Microsoft Office and therefore the contents of this folder will no longer be accessible after the upgrade.

If you have previously installed Teamworks for Office 2003, and you are upgrading to IBM BPM for Microsoft Office V7.5, follow these upgrade instructions.

1. Uninstall your previous version of the product. There are two methods for upgrading to IBM BPM for Microsoft Office: Interactive removal and installation, or silent removal and installation.
   - Interactive installation method:
     a. If necessary, upgrade Microsoft Office 2003 to Microsoft Office 2007 or Office 2010 before upgrading to IBM BPM for Microsoft Office.

        Note: Do not uninstall Microsoft Office 2003 Primary Interop Assemblies (PIA) until the IBM BPM for Microsoft Office upgrade is complete.
     b. Make sure all the IBM BPM for Microsoft Office software prerequisites are installed. For more information, see "Software and hardware requirements for installing IBM BPM for Microsoft Office" on page 1.
     c. Double-click the **IBM-BPM-for-Office-Installer.exe** installer program file.
     d. The installer program prompts you to remove any earlier versions of the product that it finds on the client. The installer program then installs IBM BPM for Microsoft Office on your system.
   - Silent installation method:
     a. Remove the earlier version by running one of the following commands, depending on which version is installed on your system.
        Teamworks for Office 2003 2.0 SP1:
        ```
        msiexec /uninstall IBM-BPM-for-Office-Installer.msi /qn REMOVE=ALL
        ```
        Teamworks for Office 2003 2.0:
        ```
        msiexec /uninstall IBM-BPM-for-Office-Installer.msi /qn REMOVE=ALL
        ```
        For Lombardi for Office 2003, silent removal using a command is not supported. Instead, click **Start** > **All Programs** > **Lombardi for Office** > **Uninstall Lombardi for Office 2003**. The uninstaller wizard opens.
     b. Rename the IBM BPM for Microsoft Office settings file. For example, rename **C:\Documents and Settings\<user name>\Application Data\Lombardi\settings.xml** to **C:\Documents and Settings\<user name>\Application Data\Lombardi\settings_2003.xml**. This step creates a backup copy of the settings file. The settings used for Teamworks for Office 2003 are not valid for IBM BPM for Microsoft Office.
     c. Install IBM BPM for Microsoft Office using the instructions provided in the section "Running the IBM BPM for Microsoft Office installer" on page 4.
2. Start Microsoft Outlook.

If the upgrade is successful, an **IBM BPM for Office** directory is created at the same hierarchical level as the Mailbox folder.

Note: By default, the IBM BPM for Microsoft Office installation sets the authentication mode to Integrated Authentication. If you are updating your installation, be sure to verify that the authentication setting is correct in your Microsoft Outlook client. For more information, see "Setting up IBM BPM for Microsoft Office in Microsoft Outlook" on page 7.

Installing IBM BPM for Microsoft Office

There are two ways to install IBM Business Process Manager for Microsoft Office Add-On. You can install by running the IBM BPM for Microsoft Office installer program, or use Microsoft Systems Management Server (SMS) to deploy to large installation bases.

Before installing IBM BPM for Microsoft Office, review the release notes for important, late-breaking information.

Running the IBM BPM for Microsoft Office installer

Install IBM Business Process Manager for Microsoft Office Add-On using the installer program.

Before installing IBM BPM for Microsoft Office, make sure that your system meets these requirements:
* Microsoft Office 2007 or Microsoft Office 2010 is installed.
* All of the components listed in the *Software requirements* topic are installed.

   Note: The IBM Business Process Manager for Microsoft Office Add-On installer does not install the Office 2007 Primary Interop Assemblies or VSTO 3.0 Runtime prerequisites. You must install these programs yourself before running the IBM BPM for Microsoft Office installer. See "Software and hardware requirements for installing IBM BPM for Microsoft Office" on page 1.
* You must have Administrator privileges or Domain Administrator privileges to run the **IBM-BPM-for-Office-Installer.exe** file.
* Optional: If you want to use single sign-on (SSO) to log on to IBM Business Process Manager, follow the administrative steps required to set up SSO for your IBM Business Process Manager system before installing IBM BPM for Microsoft Office.

IBM Business Process Manager supports Kerberos-based automatic login (often referred to as single signon). This functionality reduces configuration overhead and simplifies the authentication process by using the credentials of the current Windows user to authenticate with IBM Business Process Manager. The Kerberos protocol enables IBM Business Process Manager users to automatically log on to IBM Process Portal, IBM Process Admin Console, IBM Process Center Console, IBM BPM for Microsoft Office, and IBM BPM for Microsoft SharePoint. For more information, see "Configuring single sign-on authentication with IBM Process Server" on page 7. For help with implementing single signon for IBM BPM for Microsoft Office, contact IBM customer support.

1. To run the IBM BPM for Microsoft Office installer, double-click the **IBM-BPM-for-Office-Installer.exe** file and then enter the appropriate information by responding to the prompts.
2. The default installation directory is **C:\Program Files\IBM\Business Process Manager for Office**. You can click **Change** to specify a different directory.
3. Click **Finish** to complete the installation.

Running the silent installer

You can install IBM Business Process Manager for Microsoft Office Add-On silently using a command.

Before running the silent installer, make sure that your system meets these requirements:
* Previous versions of the product have been removed. For more information, see "Removing the product" on page 9. Specific instructions for removing Teamworks for Office 2003 are provided in *Upgrading from Teamworks for Office 2003*, in the silent installation steps.
* Prerequisite client software is installed. The installer program prompts you for the prerequisite software if it is not found on the client system. For more information, see section *Software requirements for IBM BPM for Microsoft Office*.
* Access permissions are correct. You must have Administrator privileges or Domain Administrator privileges to run the **IBM-BPM-for-Office-Installer.msi** file.

- You have read and agree with the IBM BPM for Microsoft Office and client software licenses. For more information, see "Software and hardware requirements for installing IBM BPM for Microsoft Office" on page 1.

From a command line, follow these steps to silently install IBM BPM for Microsoft Office.

1. Run the **IBM-BPM-for-Office-Installer.msi** file to install IBM BPM for Microsoft Office on the network of clients. The **IBM-BPM-for-Office-Installer.msi** file enables you to run the installer program silently from a command line. You must add the **/quiet** argument to the installer command for silent installation, as shown in the example.

   ```
   "IBM-BPM-for-Office-Installer.msi" /quiet
   ```

   You can also generate an installation log file by adding the **/L*** parameter and a file name at the end of the command, as shown in this example:

   ```
   "IBM-BPM-for-Office-Installer.msi" /quiet /L* installLog.txt
   ```

2. You can install silently using the **msiexec** syntax, as shown in the example.

   ```
   msiexec /package|"IBM-BPM-for-Office-Installer.msi" /qn /L* installLog.txt
   ```

3. Optional: Configure the installation silently. You can configure the installation silently, or leave the configuration up to each client user to perform in Microsoft Outlook. For more information, see the section *Setting up IBM BPM for Microsoft Office in Microsoft Outlook*. To configure the installation silently, pass the command arguments for configuring the client installation to the MSI file. Use the following command arguments to perform the silent configuration:

   - **LSWSERVER**: This is the address of the IBM Process Server. The valid syntax for this property is **http://servername:port**.
   - **LSWUSER**: Specifies the IBM Business Process Manager user name. This argument is not necessary if you are using integrated authentication, which is the default authentication mode.
   - **LSWSAVEDSEARCHES**: This argument must include a comma-delimited list of saved searches to synchronize. Supply the numeric ID of each saved search, for example: 1 for Inbox, 2 for History, 3 for Help Requests, or 4 for Alerts.
   - **LSWAUTHTYPE**: This argument specifies the authentication mode, which can be basic or integrated. The default mode is integrated authentication.

   When performing a silent configuration, you must add the **/quiet** argument to the MSI command, as shown in the following example.

   ```
   "IBM-BPM-for-Office-Installer.msi" /quiet LSWSERVER=http://myserver:8081 LSWUSER=tw_admin LSWSAVEDSEARCHES=1,2,3 LSWA
   ```

Installing IBM BPM for Microsoft Office using Microsoft Systems Management Server

You can install IBM Business Process Manager for Microsoft Office Add-On using Microsoft Systems Management Server (SMS).

This installation method is ideal in environments that require multiple installations of IBM BPM for Microsoft Office across a network of clients. The following steps show how to configure SMS for deployment to a group of users. The example assumes that the SMS site server is also the distribution point, and that all the client systems where IBM BPM for Microsoft Office is installed are assigned to a single SMS site server. These steps illustrate an installation procedure that requires no client interaction.

Before installing IBM BPM for Microsoft Office, make sure that the prerequisite client software is installed. The installer program fails and displays an error message if the prerequisite client software is not found during installation. For more information, see "Software and hardware requirements for installing IBM BPM for Microsoft Office" on page 1.

1. Start the SMS Administrator Console.

2. Create an SMS collection that includes all the users or client systems to which you are installing IBM BPM for Microsoft Office. For example, the collection might include All Users, or All Windows XP Professional Systems.

3. Enable IBM Business Process Manager folder home pages using a group policy. In Microsoft Office Outlook, the home page setting is disabled for non-default stores. Therefore, by default the IBM BPM for Microsoft Office Today and My Tasks views are disabled. To enable the views, apply a group policy by following the instructions provided under Resolution: Method 1 in the Microsoft Support knowledge article.

4. Copy the **IBM-BPM-for-Office-Installer.msi** file to a local directory on the SMS server.

5. Create an SMS Package for the IBM BPM for Microsoft Office installation.

   a. You can create a package in the SMS Administrator console by clicking **Packages** , then selecting **New** > **Package** .

   b. In the Package Properties window, click the **General** tab, and enter the package values.

   c. In the **Data Source** tab, select **This package contains source files**.

   d. Under **Source directory** , click **Set** .

   e. In the **Set Source Directory** window, select **Local drive on the site server**.

   f. Navigate to the directory that contains the MSI file, and set the directory as the Source Directory for the package.

6. Add a distribution point to the package. For example, the distribution point can be the local SMS site server.

   a. Edit the Program Properties to add the program to the SMS package.

   b. In the Program Properties window, click the **General** tab, then enter the appropriate installation command. For example:

   ```
   "IBM-BPM-for-Office-Installer.msi" /quiet LSWSERVER=http://myserver:8081 LSWUSER=tw_admin LSWSAVEDSEARCHES=1,2,3 LSW
   ```

   c. Add the program requirements. For more information about program requirements for IBM BPM for Microsoft Office, see "Software and hardware requirements for installing IBM BPM for Microsoft Office" on page 1.

   d. Click on the **Environment** tab, then set the **Run Mode** to **Run with administrative rights** . Make sure that the option **Allow users to interact with this program** is not selected.

   e. Click on the **Advanced** tab, then select **Run once for the computer**.

7. Distribute IBM BPM for Microsoft Office software to the client systems.

   a. Right-click on the collection name that you created previously. This collection must include all users or client systems where you want to install IBM BPM for Microsoft Office.

   b. Click **All Tasks** > **Distribute Software to Clients**.

   c. Select your **Package**.

   d. Select your **Distribution Point**.

   e. Select your **Program**.

   f. Select **Create a New Advertisement**, and set the advertisement schedule.

   g. Select **Assign the Program**, and set the assignment time.

8. On the client system, when the assignment time arrives, the IBM BPM for Microsoft Office installation is launched.

   a. A message is displayed with the following text:

   Assigned Program About to Run An assigned program will run in 5 minutes Double-click here for more information . . .

   b. You can see detailed information about the installation by double-clicking in the message. For example:

   Program Countdown Status <name of the installation package> This program will begin running in 1 minute 42 seconds I

   c. When the countdown ends, the installation begins.

   d. When the installation is complete, restart Microsoft Outlook.

Configuring single sign-on authentication with IBM Process Server

To enable IBM Business Process Manager for Microsoft Office Add-On to communicate with IBM Business Process Manager using single signon (SSO), you must configure IBM Process Server to accept plain-text logon credentials from IBM BPM for Microsoft Office.

1. Open the *PROFILE_HOME*\config\cells*cell_name*\nodes*node_name*\servers*server_name*\ *server_type*\config\100Custom.xml file, where *server_type* is either process-server or process-center, depending on your server type.
2. Add the following code block within the **<properties>** element:

   <properties> . . . <authoring-environment merge="mergeChildren"> <add-redirect-url-credentials merge="replace">true</

3. Save your changes.
4. Restart IBM Process Server.

IBM BPM for Microsoft Office directories and files installed on the client

When you install IBM Business Process Manager for Microsoft Office Add-On, a IBM BPM for Microsoft Office folder is created as a peer folder to the Mailbox folder in Microsoft Outlook. This folder contains your IBM BPM for Microsoft Office tasks and saved searches.

Additionally, a directory containing IBM Business Process Manager information is saved locally for offline viewing on the client system. This directory includes the **TfoData.pst** file, which is required for IBM BPM for Microsoft Office to run properly.

The location of the IBM BPM for Microsoft Office directory is:
- **C:\Documents and Settings\[user_name]\Application Data\Lombardi\Office** on Microsoft Windows® XP Professional.
- **C:\Users\[user_name]\AppData\Roaming\Lombardi\Office** on Microsoft Windows Vista and Microsoft Windows 7.

The IBM BPM for Microsoft Office **TfoData.pst** file is different from your personal email PST file, and it resides in a different location in the file system. Only data from IBM BPM for Microsoft Office is included in the **TfoData.pst** file, so the file does not affect your personal email settings.

Configuring IBM BPM for Microsoft Office

After you have successfully installed IBM BPM for Microsoft Office, configure Microsoft® Outlook and IBM BPM for Microsoft Office.

Setting up IBM BPM for Microsoft Office in Microsoft Outlook

After you have successfully installed IBM Business Process Manager for Microsoft Office Add-On, when you start Microsoft Outlook for the first time, you must configure Microsoft Outlook so that IBM BPM for Microsoft Office can run properly.

1. Start Microsoft Outlook.
2. When prompted, accept the certificate to complete the installation of IBM BPM for Microsoft Office.
3. In the Configure Server window, select the Authentication mode. You can select **Basic** authentication or **Integrated** authentication. Integrated authentication is the default authentication mode.
4. Type the server address, including the port where IBM Process Server runs.
5. >If you are using basic authentication mode, enter your username and password. You can test your connection to the server by clicking **Test** . If the connection is successful, a **Test Passed** message is displayed in the Configure Server window.

Note: The **Username** and **Password** fields are disabled when integrated authentication mode is selected. For more information about integrated authentication mode, see "Configuring integrated authentication in IBM BPM for Microsoft Office." You can change the authentication mode using the Configure Server window. Click **File** > **Options** > **Add-ins** > **Add-in options** , then click the **IBM Business Process Manager** tab.

6. Configure the IBM BPM for Microsoft Office saved searches options.

   a. In the Configure Server window, click **Saved Searches**.

      You can view Inbox items, Alerts, History, and Help Requests using the default saved searches. To change the saved searches that are displayed in Microsoft Outlook, click to select additional searches, or to clear the default searches. The saved search results are displayed on the My Tasks page.

   b. To enable task synchronization, click the options under Saved Search Task Synchronization.

      After you have established a connection to the IBM Process Server, in a runtime environment, you can synchronize saved search tasks by clicking **Synchronize** on the IBM Business Process Manager toolbar in Microsoft Outlook. If the **Toolbar button synchronizes tasks** option is selected, Microsoft Outlook downloads your tasks when you click **Synchronize**. When the **Schedule an automatic sync every X minutes** option is selected, Microsoft Outlook downloads your tasks at the specified polling interval. The interval is specified in minutes.

7. Click **OK** when you are finished with the configuration changes.

8. After you have established a connection to the specified IBM Process Server in the runtime environment, synchronize data by clicking **Synchronize** on the IBM Business Process Manager toolbar.

9. Click **IBM Business Process Manager** on the toolbar. The IBM BPM for Microsoft Office Today page opens, displaying the latest information about your processes.

If you want to change the configuration settings after running Microsoft Outlook, click **Tools** > **Options**, and then click theIBM BPM for Microsoft Office tab.

Configuring integrated authentication in IBM BPM for Microsoft Office

The integrated authentication between Microsoft® Windows® and IBM Business Process Manager for Microsoft Office Add-On allows you to access the IBM BPM for Microsoft Office client more efficiently.

IBM Business Process Manager supports Kerberos-based automatic logon. This authentication mode is also referred to as single sign-on (SSO). This functionality reduces configuration overhead and simplifies the authentication process by using the credentials of the current Windows user to authenticate with IBM Business Process Manager. The Kerberos protocol allows IBM Business Process Manager users to automatically log on to IBM Process Portal Console, IBM Process Admin Console, IBM BPM for Microsoft Office, and IBM BPM for Microsoft SharePoint.

When single sign-on is implemented, you no longer need to configure a username and password in IBM BPM for Microsoft Office. Instead, IBM BPM for Microsoft Office authenticates using your Windows credentials. IBM BPM for Microsoft Office supports integrated authentication by default.

To change the authentication setting, follow these steps.

1. In Microsoft Outlook, click **Tools** > **Options** > **Add-ins** > **Add-in options**.
2. In the **Options** window, click the **IBM BPM for Microsoft Office** tab.
3. Select **Integrated** or **Basic** from the Authentication menu.

For help with implementing single sign-on for IBM BPM for Microsoft Office, contact IBM customer support.

Removing the product

To remove IBM Business Process Manager for Microsoft Office Add-On from your system, run the IBM BPM for Microsoft Office uninstaller program, then follow the instructions provided by the program. You can also uninstall silently using a command.

A short cut to the uninstall program is provided in the Windows® Start Programs menu. Click **Start** > **All Programs** > **IBM BPM for Microsoft Office Add-On** > **Uninstall IBM BPM for Microsoft Office**.

To uninstall silently, run the following command:

```
msiexec /uninstall "IBM-BPM-for-Office-Installer.msi" /qn REMOVE=ALL
```

Troubleshooting

Review the troubleshooting issues to diagnose and fix common problems.

Because the configuration of your particular environment might differ from the standard configuration, you might see some of the following common issues when you are installing or updating the product. Make sure that you also search release notes items in the IBM Business Process Manager support portal for late-breaking information.

Configuring the location of the tfo.log file

A log file containing information about installation and application operation is useful for troubleshooting. To enable IBM BPM for Microsoft Office to create the log file **tfo.log** , you must edit the **logconfig.xml** file and enter a valid directory path as the value of the **<file>** property. For example:

```
<file value="c:\tfo.log"/>
```

The IBM BPM for Microsoft Office installer program creates the log configuration file **logconfig.xml** in the following location:

C:\Documents and Settings\Administrator\Application Data\IBM\Business Process Manager Office for Microsoft® Windows® XP Professional.

C:\Users\<user_name>\AppData\Roaming\IBM\Business Process Manager for Office for Microsoft Vista, Microsoft Windows® 7, and Microsoft Windows 2008.

Saving Inbox items to disk does not work in IBM BPM for Microsoft Office

In Microsoft Outlook, you can save a message to disk (for example, by dragging it to the desktop) and then view the message offline as a fully functional Outlook message in other Microsoft Office applications. Although IBM BPM for Microsoft Office appears to provide the same function for task items in the IBM Business Process Manager Inbox, the saved *.msg item does not work because the offline viewing function is not supported in IBM BPM for Microsoft Office.