

WebSphere. Lombardi Edition 7.2

*Lombardi for Office 7.2.0 Installation
and Configuration Guide*



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Introduction to installing and configuring Lombardi for Office

IBM® WebSphere® Lombardi Edition for Microsoft® Office Add-on 7.2.0 is an integrated add-on for Microsoft Outlook in Microsoft Office. The installing and configuring guide helps you install, configure, and troubleshoot Lombardi for Office.

Welcome to the *Lombardi for Office Installation and Configuration Guide*.

The guide includes the following sections (some installation environments might include additional instructions).

- *Software and hardware requirements* describes the necessary system configuration for installing the product.
- *Upgrading from Teamworks for Office* describes how to upgrade from previous versions of the product.
- *Installing Lombardi for Office* describes how to install and configure the product.
- *Configuring Lombardi for Office* describes how to configure the product for use with Microsoft Outlook.
- *Removing the product* describes how to remove the product from your system.
- *Troubleshooting* provides solutions to common problems that can occur during installation and deployment of the product.

Software and hardware requirements for installing Lombardi for Office

Make sure that your system meets the software and hardware requirements before installing IBM® WebSphere® Lombardi Edition for Microsoft® Office Add-on 7.2.0.

Software requirements

The following table describes the software requirements for Lombardi for Office. In addition to the software requirements listed here, IBM WebSphere WebSphere Lombardi Edition 7.2 or later is required.

Software requirements for installing Lombardi for Office

Component type	Component name
Operating systems	<ul style="list-style-type: none"> Microsoft Windows® 7 (32-bit and 64-bit) Microsoft Windows XP Professional SP2 Microsoft Windows Vista (32-bit and 64-bit)
Client	<ul style="list-style-type: none"> Microsoft Office 2007 Collaboration Data Objects (CDO), version 1.2.1 Download website [http://www.microsoft.com/downloads/details.aspx?FamilyID=2714320d-c997-4de1-986f-24f081725d36&displaylang=en] The ability to store a local PST file such as <code>TfoData.pst</code> is required to use the product. For more information, see <i>Lombardi for Office directories and files installed on the client</i>. 2007 Microsoft Office Primary Interop Assemblies, version 1.0 Download website [http://www.microsoft.com/downloads/details.aspx?familyid=59DAEBAA-BED4-4282-A28C-B864D8BFA513&displaylang=en] Visual Studio Tools for the Microsoft Office system 3.0 Runtime, version 9.0.21022.123 Download website [http://www.microsoft.com/downloads/details.aspx?familyid=54EB3A5A-0E52-40F9-A2D1-EECD7A092DCB&displaylang=en] Microsoft .NET 3.5 Service Pack 1 Download website [http://www.microsoft.com/downloads/en/details.aspx?familyid=AB99342F-5D1A-413D-8319-81DA479AB0D7&displaylang=en]

Hardware requirements

The following hardware sizing suggestion is the minimum hardware required for running Lombardi for Office. The Lombardi Application 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

Software and hardware requirements for installing Lombardi for Office

- 512 MB RAM
- About 250 MB of free disk space for the application

Upgrading from Teamworks for Office

If you have previously installed Lombardi for Office 2003, Teamworks for Office 2003 or Teamworks for Office 2007, and you have upgraded to Microsoft® Office 2007, follow these instructions to upgrade to IBM® WebSphere® Lombardi Edition for Microsoft® Office Add-on 7.2.0.

Upgrading from Teamworks for Office 2007

You can upgrade from Teamworks for Office 2007 to IBM® WebSphere® Lombardi Edition for Microsoft® Office Add-on 7.2.0.



Lombardi for Office 7.2.0 requires WebSphere Lombardi Edition 7.2 or later. Lombardi for Office 7.2.0 is not supported with Teamworks 7.

If you have previously installed Teamworks for Office 2007, and you are upgrading to Lombardi for Office 7.2.0, follow these upgrade steps.

1. There are two methods for upgrading to Lombardi for Office 7.2.0: interactive removal and installation, or silent removal and installation.

- Interactive installation method: double-click on the `Lombardi-for-Office-Installer.exe` installer program file.

- Silent installation method:

a. Remove the earlier version of Teamworks for Office 2007 using the following command:

```
msiexec /uninstall Teamworks-for-Office-2007-1.0-Installer.msi /qn REMOVE=ALL
```

b. Install Lombardi for Office 7.2.0 using the instructions provided in the section *Running the silent installer*.

2. Start Microsoft Outlook.

If the upgrade is successful, a **Lombardi Edition** directory is created at the same hierarchical level as the Mailbox folder.



By default, the Lombardi for Office 7.2.0 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 the section *Setting up Lombardi for Office in Microsoft Outlook*.

Upgrading from Teamworks for Office 2003

You can upgrade from Lombardi for Office 2003 or Teamworks for Office 2003 to IBM® WebSphere® Lombardi Edition for Microsoft® Office Add-on 7.2.0.

Before you begin the upgrade:

- Uninstall Teamworks for Office 2003 before upgrading from Microsoft Office 2003 to Microsoft Office 2007.

- Make sure you have the correct version of WebSphere Lombardi Edition installed. Lombardi for Office 7.2.0 requires WebSphere Lombardi Edition 7.2 or later. Lombardi for Office is not supported with Teamworks 7.
- 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. You must submit any unsubmitted forms before performing the upgrade steps. The offline Outbox folder is not part of Lombardi for Office 7.2.0 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 Lombardi for Office 7.2.0, follow these upgrade instructions.

1. There are two methods for upgrading to Lombardi for Office 7.2.0 : interactive removal and installation, or silent removal and installation.

- Interactive installation method:

- a. If necessary, upgrade Microsoft Office 2003 to Microsoft Office 2007 before upgrading Lombardi for Office.



Do not uninstall Microsoft Office 2003 Primary Interop Assemblies (PIA) until the Lombardi for Office upgrade is complete.

- b. Make sure all the Lombardi for Office 7.2.0 software prerequisites are installed. For more information, see the section *Software and hardware requirements*.
 - c. Double-click the `Lombardi-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 Lombardi for Office 7.2.0 on your system.
- Silent installation method:
- a. Remove the earlier version of Teamworks for Office 2003 by running one of the following commands, depending on which version of Teamworks for Office 2003 is installed on your system.

Teamworks for Office 2003 2.0 SP1:

```
msiexec /uninstall Teamworks-for-Office-2003-2.0-SP1-Installer.msi /qn REMOVE=ALL
```

Teamworks for Office 2003 2.0:

```
msiexec /uninstall Teamworks-for-Office-2003-2.0-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 program appears.

- b. Rename the Lombardi for Office settings file. For example, rename `C:\Documents and Settings\\Application Data\Lombardi\settings.xml` to `C:\Documents and Settings\\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 Lombardi for Office 7.2.0.

- c. Install Lombardi for Office 7.2.0 using the instructions provided in the section *Running the silent installer*.

2. Start Microsoft Outlook.

If the upgrade is successful, a **Lombardi Edition** directory is created at the same hierarchical level as the Mailbox folder.



By default, the Lombardi for Office 7.2.0 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 the section *Setting up Lombardi for Office in Microsoft Outlook*.

Installing Lombardi for Office

There are two ways to install IBM® WebSphere® Lombardi Edition for Microsoft® Office Add-on 7.2.0. You can install by running the Lombardi for Office installer program, or use Microsoft Systems Management Server (SMS) to deploy to large installation bases.

Before installing Lombardi for Office, review the *Lombardi for Office 7.2.0 Release Notes* for important, late-breaking information.

Running the Lombardi for Office installer

Install IBM® WebSphere® Lombardi Edition for Microsoft® Office Add-on 7.2.0 using the installer program.

Before installing Lombardi for Office, make sure that your system meets these requirements:

- Microsoft Office 2007 is installed.
- All of the components listed in the *Software requirements* section are installed.



The IBM® WebSphere® Lombardi Edition for Microsoft® Office Add-on 7.2.0 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 Lombardi for Office installer. See the section *Software and hardware requirements* for more information.

- You must have Administrator privileges or Domain Administrator privileges to run the `Lombardi-for-Office-Installer.exe` file.
- Optional: If you want to use single sign-on (SSO) to log on to WebSphere Lombardi Edition, follow the administrative steps required to set up SSO for your WebSphere Lombardi Edition system before installing Lombardi for Office.

WebSphere Lombardi Edition supports Kerberos-based automatic login (often referred to as single sign-on). This functionality reduces configuration overhead and simplifies the authentication process by using the credentials of the current Windows user to authenticate with WebSphere Lombardi Edition. The Kerberos protocol enables WebSphere Lombardi Edition users to automatically log on to Lombardi Process Portal, Lombardi Process Server Console, Lombardi Process Center Console, Lombardi for Office, and Lombardi for Sharepoint. For more information, see the *Configuring integrated authentication in Lombardi for Office* section. For help with implementing single sign-on for Lombardi for Office, contact IBM customer support.

1. To run the Lombardi for Office installer, double-click the `Lombardi-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\WebSphere Lombardi Edition for Microsoft (R) Office Add-on\`. You can click **Change** to specify a different directory.
3. Click **Finish** to complete the installation.

Running the silent installer

You can install IBM® WebSphere® Lombardi Edition for Microsoft® Office Add-on 7.2.0 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 the section *Removing the product*. Specific instructions for removing Teamworks for Office 2003 are provided in the section *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 the section *Software requirements for Lombardi for Office*.
- Access permissions are correct. You must have Administrator privileges or Domain Administrator privileges to run the `Lombardi-for-Office-Installer.msi` file.
- You have read and agree with the Lombardi for Office and client software licenses. For more information, see the sections *Software and hardware requirements for installing Lombardi for Office* and *Important Notices*.

From a command line, follow these steps to silently install Lombardi for Office.

1. Run the `Lombardi-for-Office-Installer.msi` file to install Lombardi for Office on the network of clients.

The `Lombardi-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.

```
"Lombardi-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:

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

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

```
msiexec /package|"Lombardi-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 Lombardi for 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 Lombardi server. The valid syntax for this property is `http://servername:port`.
- `LSWUSER`: Specifies the WebSphere Lombardi Edition 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 examples.

```
"Lombardi-for-Office-Installer.msi" /quiet LSWSERVER=http://myserver:8081
LSWUSER=tw_admin LWSAVEDSEARCHES=1,2,3 LSWAUTHTYPE=basic
```

Installing Lombardi for Office using Microsoft Systems Management Server

You can install IBM® WebSphere® Lombardi Edition for Microsoft® Office Add-on 7.2.0 using Microsoft Systems Management Server (SMS).

This installation method is ideal in environments that require multiple installations of Lombardi for 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 Lombardi for Office is installed are assigned to a single SMS site server. These steps illustrate an installation procedure that requires no client interaction.

Before installing Lombardi for 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 the section *Software requirements for Lombardi for Office*.

1. Start the SMS Administrator Console.
2. Create an SMS collection that includes all the users or client systems to which you are installing Lombardi for Office. For example, the collection might include All Users, or All Windows XP Professional Systems.
3. Enable WebSphere Lombardi Edition folder home pages using a group policy.

In Microsoft Office Outlook 2007, the home page setting is disabled for non-default stores. Therefore, by default the Lombardi for 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](http://support.microsoft.com/kb/923933) [http://support.microsoft.com/kb/923933].

4. Copy the `Lombardi-for-Office-Installer.msi` file to a local directory on the SMS server.
5. Create an SMS Package for the Lombardi for 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:


```
"Lombardi-for-Office-Installer.msi" /quiet LSWSERVER=http://myserver:8081
LSWUSER=tw_admin LSWAVEDSEARCHES=1,2,3 LSWAUTHTYPE=basic
```
 - c. Add the program requirements. For more information about program requirements for Lombardi for Office, see the section *Software and hardware requirements for installing Lombardi for Office*.
 - 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 Lombardi for 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 Lombardi for 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 Lombardi for 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
If you are ready to run this program now, click Run

- c. When the countdown ends, the installation begins.
- d. When the installation is complete, restart Microsoft Outlook.

Configuring single sign-on authentication with Lombardi Process Server

To enable IBM® WebSphere® Lombardi Edition for Microsoft® Office Add-on 7.2.0 to communicate with WebSphere Lombardi Edition using single sign-on (SSO), you must configure the Lombardi Process Server to accept plain-text logon credentials from Lombardi for Office.

1. Open the [Lombardi_home]\process-center\config\100Custom.xml file and then add the following code block within the <properties> element:

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

2. Save your changes.
3. Restart Lombardi Process Server.

Lombardi for Office directories and files installed on the client

When you install IBM® WebSphere® Lombardi Edition for Microsoft® Office Add-on 7.2.0, a Lombardi for Office folder is created as a peer folder to the Mailbox folder in Microsoft Outlook. This folder contains your Lombardi for Office tasks and saved searches.

Additionally, a directory containing WebSphere Lombardi Edition information is saved locally for offline viewing on the client system. This directory includes the TfoData.pst file, which is required for Lombardi for Office to run properly.

The location of the Lombardi for Office directory is:

- C:\Documents and Settings\\Application Data\Lombardi\Office\ on Microsoft Windows® XP Professional.
- C:\Users\\AppData\Roaming\Lombardi\Office\ on Microsoft Windows Vista and Microsoft Windows 7.

The Lombardi for 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 Lombardi for Office is included in the `TfoData.pst` file, so the file does not affect your personal email settings.

Configuring Lombardi for Office

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

Setting up Lombardi for Office in Microsoft Outlook

After you have successfully installed IBM® WebSphere® Lombardi Edition for Microsoft® Office Add-on 7.2.0, when you start Microsoft Outlook for the first time, you must configure Microsoft Outlook so that Lombardi for Office can run properly.

1. Start Microsoft Outlook.
2. When prompted, accept the certificate to complete the installation of Lombardi for 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 Lombardi 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.



The **Username** and **Password** fields are disabled when integrated authentication mode is selected. For more information about integrated authentication mode, see the section *Configuring integrated authentication in Lombardi for Office*. You can change the authentication mode using the Configure Server window. Click **Tools > Options**, then click the **Lombardi Edition** tab.

6. Configure the Lombardi for 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 Lombardi Process Server, in a runtime environment, you can synchronize saved search tasks by clicking **Synchronize** on the Lombardi 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 Lombardi Process Server in the runtime environment, synchronize data by clicking **Synchronize** on the Lombardi toolbar.

9. Click **Lombardi Edition** on the toolbar. The Lombardi for 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 the **Lombardi for Office** tab.

Configuring integrated authentication in Lombardi for Office

The integrated authentication between Microsoft® Windows® and IBM® WebSphere® Lombardi Edition for Microsoft® Office Add-on 7.2.0 allows you to access the Lombardi for Office client more efficiently.

WebSphere Lombardi Edition 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 WebSphere Lombardi Edition. The Kerberos protocol allows WebSphere Lombardi Edition users to automatically log on to Lombardi Process Portal, Lombardi Process Admin Console, Lombardi for Office, and Lombardi for Sharepoint.

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

To change the authentication setting, follow these steps.

1. In Microsoft Outlook, click **Tools > Options**.
2. In the **Options** window, click the **Lombardi for Office** tab.
3. Select **Integrated** or **Basic** from the Authentication menu.

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

Removing the product

To remove IBM® WebSphere® Lombardi Edition for Microsoft® Office Add-on 7.2.0 from your system, run the Lombardi for 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 WebSphere Lombardi Edition for Microsoft Office Add-on > Uninstall Lombardi for Office**.

To uninstall silently, run the following command:

```
msiexec /uninstall "Lombardi-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 review the *Known problems and workarounds* section in *Lombardi for Office 7.2.0 Release Notes* 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 Lombardi for 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 Lombardi for Office installer program creates the log configuration file `logconfig.xml` in the following location:

`C:\Documents and Settings\\Application Data\Lombardi\Office\ for Microsoft® Windows® XP Professional.`

`C:\Users\\AppData\Roaming\Lombardi\Office\ for Microsoft Vista and Microsoft Windows® 7.`

Saving Inbox items to disk does not work in Lombardi for 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 Lombardi for Office appears to provide the same function for task items in the WebSphere Lombardi Edition Inbox, the saved `*.msg` item does not work because the offline viewing function is not supported in Lombardi for Office.

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