

FileNet Integration for Microsoft Office  
Version 1.1.5.0

*Installation and Upgrade Guide*





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**Note**

Before using this information and the product it supports, read the information in "Notices" on page 25.

This edition applies to version 1.1.5.0 of IBM FileNet Integration for Microsoft Office (product number 5724-R81), and to all subsequent releases and modifications until otherwise indicated in new editions.

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## ibm.com and related resources

Product support and documentation are available from [ibm.com](http://www.ibm.com).

### Support and assistance

Product support is available on the Web. Click Support from the product Web site at:

#### FileNet Content Manager Support

<http://www.ibm.com/software/data/content-management/filenet-content-manager/support.html>

### Information center

You can view the product documentation in an Eclipse-based information center that you can install when you install the product. By default, the information center runs in a Web server mode that other Web browsers can access. You can also run it locally on your workstation. See the information center at <http://publib.boulder.ibm.com/infocenter/p8docs/v4r5m1/index.jsp>.

### PDF publications

You can view the PDF files online using the Adobe Acrobat Reader for your operating system. If you do not have the Acrobat Reader installed, you can download it from the Adobe Web site at <http://www.adobe.com>.

See the following PDF publications Web sites:

Product	Web site
Product Documentation for FileNet P8 Platform	<a href="http://www.ibm.com/support/docview.wss?rs=3278&amp;uid=swg27010422">http://www.ibm.com/support/docview.wss?rs=3278&amp;uid=swg27010422</a>

#### "How to send your comments"

Your feedback is important in helping to provide the most accurate and highest quality information.

#### "Contacting IBM" on page vi

To contact IBM customer service in the United States or Canada, call 1-800-IBM-SERV (1-800-426-7378).

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## How to send your comments

Your feedback is important in helping to provide the most accurate and highest quality information.

Send your comments by using the online reader comment form at [https://www14.software.ibm.com/webapp/iwm/web/signup.do?lang=en\\_US&source=swg-rcf](https://www14.software.ibm.com/webapp/iwm/web/signup.do?lang=en_US&source=swg-rcf).

## Consumability survey

You are invited to tell IBM how to improve the consumability of software products. If you want to help IBM make IBM® FileNet® P8 easier to use, take the Consumability Survey at <http://www.ibm.com/software/data/info/consumability-survey/>.

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## Contacting IBM

To contact IBM customer service in the United States or Canada, call 1-800-IBM-SERV (1-800-426-7378).

To learn about available service options, call one of the following numbers:

- In the United States: 1-888-426-4343
- In Canada: 1-800-465-9600

For more information about how to contact IBM, see the Contact IBM Web site at <http://www.ibm.com/contact/us/>.



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# Planning and preparing for the IBM FileNet Integration for Microsoft Office installation

Planning and preparation tasks for IBM FileNet Integration for Microsoft® Office are required before installation. Complete these preparation tasks and capture IBM FileNet Integration for Microsoft Office environment installation values in the Installation and Upgrade Worksheet before you begin to install IBM FileNet Integration for Microsoft Office. You can then use the worksheet to complete your installation.

## “Definition of installation roles”

The tasks in this guide and the rows in the Installation and Upgrade Worksheet are organized by administrative roles. Your organization might have different roles, and some of the responsibilities of listed roles will vary from those assigned by default in this documentation.

## “Using the installation and upgrade worksheet” on page 2

The Installation and Upgrade Worksheet is a Microsoft Excel spreadsheet (p8\_worksheet.xls). The worksheet describes the properties and parameters required to complete IBM FileNet P8 installation, upgrade, and configuration programs, and provides a way to record the values you assign to these properties and parameters.

## “IT administrator installation tasks” on page 4

The Information Technology administrator must prepare the network and operating systems, and carry out certain security configurations to prepare your environment for FileNet Integration for Microsoft Office.

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## Definition of installation roles

The tasks in this guide and the rows in the Installation and Upgrade Worksheet are organized by administrative roles. Your organization might have different roles, and some of the responsibilities of listed roles will vary from those assigned by default in this documentation.

### Installation administrator

- Runs IBM FileNet P8 installers during initial setup.
- Runs the Configuration Manager tool during initial setup, followed by starting IBM FileNet Enterprise Manager.
- Runs IBM FileNet P8 Upgrade programs during upgrades.
- Abbreviated as IA. Responsible for coordinating the information described in this worksheet. The information itself will require the input from the other roles.

The role of IA is usually filled by an IBM FileNet Certified Professional (FCP).

### Information technology administrator

- Responsible for the networking and operating systems settings required by IBM FileNet P8.
- Responsible for performing certain security configurations.
- Abbreviated as ITA. Responsible for providing the information in the rows in the *Installation and Upgrade Worksheet* with a value of ITA in the **Role** column.

### **Security administrator**

- Responsible for configuring the directory servers required by IBM FileNet P8 components, including Content Engine and Application Engine.
- Creates and maintains directory server user and group accounts.
- Abbreviated as SA. Responsible for providing the information in the rows in the *Installation and Upgrade Worksheet* with a value of SA in the **Role** column.

### **Database administrator**

- Creates, configures, maintains database installations and database or table spaces.
- Responsible for creating database accounts needed by IBM FileNet P8.
- For purposes of this documentation, the database administrator is expected to have responsibilities regarding the JDBC data sources.
- Abbreviated as DBA. Responsible for providing the information in the rows in the *Installation and Upgrade Worksheet* with a value of DBA in the **Role** column.

### **Application server administrator**

- Responsible for providing the application servers required by IBM FileNet P8.
- Responsible for application server administrative accounts.
- Abbreviated as ASA. Responsible for providing the information in the rows in the *Installation and Upgrade Worksheet* with a value of ASA in the **Role** column.

### **IBM FileNet P8 administrator**

- This role designation actually refers to the administrator or administrators who perform regular maintenance of Content Engine, Process Engine Application Engine, Workplace or Workplace XT.
- The administrator who logs on to Enterprise Manager by using the `gcd_admin` account or an `object_store_admin` account is considered an IBM FileNet P8 administrator.
- Abbreviated as P8A. Responsible for providing the information in the rows of the *Installation and Upgrade Worksheet* with a value of P8A in the **Role** column.

### **E-mail Administrator**

- Creates an e-mail account that will be used to configure the Notification Tab of the Process Task Manager so that Process Engine can send e-mail notifications to end users. (Required only if you use this feature.)
- Abbreviated as EA.

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## **Using the installation and upgrade worksheet**

The Installation and Upgrade Worksheet is a Microsoft Excel spreadsheet (`p8_worksheet.xls`). The worksheet describes the properties and parameters required to complete IBM FileNet P8 installation, upgrade, and configuration programs, and provides a way to record the values you assign to these properties and parameters.

Administrators who are preparing the environment for installation or upgrade of IBM FileNet P8 components must use the worksheet during their preparation tasks to record the appropriate values and provide them to the Installation Administrator who runs the installation or upgrade programs.

Some of the features of the Installation and Upgrade Worksheet are:

- Instructions: describes the worksheet and includes a button that runs the Customize Worksheet macro.
- The two highlighted columns, **Property or Parameter** and **ENTER YOUR VALUE HERE**, provide the simplest view of the requirement. The others add identifying information and help you sort and filter the rows usefully.
- The **Role** column assigns each row to an administrator and uses the following acronyms:
  - ITA: Information Technology Administrator
  - ASA: Application Server Administrator
  - DBA: Database Administrator
  - SA: Security Administrator
  - P8A: IBM FileNet P8 Administrator
- Property definitions are contained in the column titled **Description**.
- Some rows, though not all, contain a hyperlink in the **PPG Links** column. Click this hyperlink to run a query against the IBM Information Center, which opens with the Search Results pane showing the topics that contain the words in the query phrase. Browse the search results until you have enough information to be able to enter a value in the Worksheet row.
  - “Running the Customize Worksheet macro”  
The Customize Worksheet macro lets you extract only those rows that describe your environment.
  - “Autofiltering and sorting the Worksheet” on page 4  
There are several ways to organize the Worksheet to make finding properties and entering values easier.

## Running the Customize Worksheet macro

The Customize Worksheet macro lets you extract only those rows that describe your environment.

**Important:** For support of the full range of built-in filter and macro features, use Microsoft Excel to view the Installation and Upgrade Worksheet file. You can use other spreadsheet programs to view the file; however, filter and macro support can vary. For example, in Calc from OpenOffice.Org, the column filters work as expected, but the Customize Worksheet button does not.

To run the Customize Worksheet macro:

1. Open the Installation and Upgrade Worksheet (p8\_worksheet.xls) and click the **Instructions** worksheet (also called a tab).
2. Scroll down until you see the button representing the Customize Worksheet macro. Click the button.
3. Select the components and options that describe the environment you are preparing for IBM FileNet P8.
  - Installation or Upgrade
  - FileNet P8 Components
  - Application Server type
  - Operating system
  - Database type
  - Directory Server type
  - Number of object stores (adds new sets of rows for creating additional data sources)
  - Name of customized sheet

4. Click **OK**. The macro copies the rows that fulfill your selection criteria into a new worksheet with the name you entered. Enter the values for your environment into this new worksheet.
5. Click the name of the new worksheet at the bottom of the Excel window. Add your preparation values into this new worksheet.
6. Notice that the new worksheet has buttons at the top titled **Show Installer View** and **Show Full View**, depending on its state. The **Show Installer View** displays only those columns that you need while running installation or configuration programs.

## Autofiltering and sorting the Worksheet

There are several ways to organize the Worksheet to make finding properties and entering values easier.

AutoFiltering is a quick way to display only those rows that meet a certain criteria. To use AutoFilter:

1. Make sure AutoFiltering is enabled. (Select the entire row with the column headers, then click **Data** → **Filter** → **Autofilter**.) AutoFilter arrows will appear to the right of the column labels.
2. Click the **AutoFilter** arrow in the **Installation or Configuration Program** column header and select the program you are interested in (for example, PE installer).
3. Click the **AutoFilter** arrow in the **Setup Type** column header, select **Custom**, and specify **Setup Type contains Installation**.
4. For a custom AutoFilter, click the **AutoFilter** in any column header, select **Custom**, and specify Setup Type contains "Installation".
5. To turn off AutoFiltering in a column, click the column **AutoFilter** arrow and select **(All)**.
6. To reorder rows alphabetically, do a Sort:
  - a. Click anywhere in a column, for example, Column A Role.  
The only possible values in the Role column are ASA, SA, DBA, ITA, and P8A. Sorting on Role therefore groups the rows by this attribute, in alphabetic order. Several other columns also have a limited number of possible values which means they can be usefully sorted.
  - b. Click the **Sort Ascending** icon in the Excel toolbar, or use the **Data** → **Sort** menu command. The rows sort on Role.  
Sorting the Worksheet reassigns row numbers. If you refer to rows by number, be aware that row numbers change if you change the sort order.

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## IT administrator installation tasks

The Information Technology administrator must prepare the network and operating systems, and carry out certain security configurations to prepare your environment for FileNet Integration for Microsoft Office.

*"Turning off User Account Control on Vista" on page 5*

The Vista operating system has a setting that can interfere with the installation of FileNet Integration for Microsoft Office. You must turn this setting off before you run the installation.

*"Installing the .NET framework on Windows 2008" on page 5*

Installing FileNet Integration for Microsoft Office on a Windows® 2008 R2

environment requires the .NET Framework 3.5.1 feature. You must install this feature before you run the FileNet Integration for Microsoft Office installation program.

“Preparing to use FileNet Integration for Microsoft Office in a Single Sign-On (SSO) environment”

In order to use FileNet Integration for Microsoft Office with SSO, you must configure the SSO environment, the server, and the installation program.

“Preparing to use FileNet Integration for Microsoft Office in a Secure Socket Layer (SSL) environment” on page 6

If you are installing FileNet Integration for Microsoft Office in an SSL environment, you must first install the SSL certificate on the FileNet Integration for Microsoft Office client.

“Preventing Microsoft Event Viewer logging errors” on page 6

FileNet Integration for Microsoft Office logs event entries in the Windows application event log. To prevent errors from the event log, use the Microsoft Event Viewer to increase the maximum log size or overwrite events as needed. See the Event Viewer help for more information on freeing an event log when it is full.

## Turning off User Account Control on Vista

The Vista operating system has a setting that can interfere with the installation of FileNet Integration for Microsoft Office. You must turn this setting off before you run the installation.

To turn off user account control:

1. Navigate to **Start** → **Control Panel** → **User Accounts** → **User Accounts** → **Turn User Account Control on or off**.
2. Clear the checkbox called **Use User Account Control (UAC) to help protect your computer**.
3. Click **OK**.

## Installing the .NET framework on Windows 2008

Installing FileNet Integration for Microsoft Office on a Windows 2008 R2 environment requires the .NET Framework 3.5.1 feature. You must install this feature before you run the FileNet Integration for Microsoft Office installation program.

To install the .NET Framework:

1. Start the Server Manager.
2. Choose **Features** → **Add features**.
3. Choose **.NET Framework 3.5.1 Features**.
4. Follow the prompts to install the required Role Services and features.

## Preparing to use FileNet Integration for Microsoft Office in a Single Sign-On (SSO) environment

In order to use FileNet Integration for Microsoft Office with SSO, you must configure the SSO environment, the server, and the installation program.

To use FileNet Integration for Microsoft Office with SSO, Workplace XT must be collocated with the Content Engine.

To prepare for SSO:

1. Configure the client for Kerberos SSO.
2. Add the Workplace XT Web sites to the Local Intranet setting as a trusted site.
3. When you complete the fields in the FileNet Integration for Microsoft Office installation program, use only fully-qualified server names for the FileNet P8 URLs. Using an IP address or other server alias might cause problems. Contact your SSO administrator to determine the correct server names to use.

After FileNet Integration for Microsoft Office has been configured and is working in an SSO environment, you cannot change the configuration from the user interface. To switch the configuration to a different FileNet P8 server, you must edit the FileNet Integration for Microsoft Office `configuration.ini` file directly.

#### **Related concepts**

“Configuration options” on page 11

The `configuration.ini` file is similar to the bootstrap properties file. The file contains Web addresses for the Content Engine, Workplace XT, and documentation servers. The file also contains the location of the site preferences file defined in the Bootstrap settings site preference.

## **Preparing to use FileNet Integration for Microsoft Office in a Secure Socket Layer (SSL) environment**

If you are installing FileNet Integration for Microsoft Office in an SSL environment, you must first install the SSL certificate on the FileNet Integration for Microsoft Office client.

To prepare for SSL:

1. In a browser on the client where you plan to install FileNet Integration for Microsoft Office, enter the secured Content Engine URL (`https://`).
2. Follow the prompts to install the security certificate.
3. During the FileNet Integration for Microsoft Office installation, enter the secured Content Engine URL in the Content Engine URL field.

## **Preventing Microsoft Event Viewer logging errors**

FileNet Integration for Microsoft Office logs event entries in the Windows application event log. To prevent errors from the event log, use the Microsoft Event Viewer to increase the maximum log size or overwrite events as needed. See the Event Viewer help for more information on freeing an event log when it is full.

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## Installing IBM FileNet Integration for Microsoft Office

If you want to access IBM FileNet P8 documents from within Microsoft® Office 2007 applications or Outlook, you must install IBM FileNet Integration for Microsoft Office.

“Installing FileNet Integration for Microsoft Office interactively”

You can use the installation program to run an interactive installation for FileNet Integration for Microsoft Office.

“Installing FileNet Integration for Microsoft Office silently” on page 8

To install FileNet Integration for Microsoft Office silently, run the software package from the command line using the `/s` and `/qn` switches.

“Configuring processes” on page 10

In order to use processes in FileNet Integration for Microsoft Office, you must import and transfer the two workflows that are included with the FileNet Integration for Microsoft Office installation software.

“Configuration options” on page 11

The `configuration.ini` file is similar to the bootstrap properties file. The file contains Web addresses for the Content Engine, Workplace XT, and documentation servers. The file also contains the location of the site preferences file defined in the Bootstrap settings site preference.

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### Installing FileNet Integration for Microsoft Office interactively

You can use the installation program to run an interactive installation for FileNet Integration for Microsoft Office.

For SSL environments, provide the secure (`https://`) Content Engine URL in the installation panel field.

To install interactively:

1. Open your completed Installation and Upgrade Worksheet file.

**Tip:** In the worksheet file, verify that the **Data** → **Filter** → **AutoFilter** command is enabled. To view only Content Engine values, filter by **FIMO Installer** in the **Installation or Configuration Program** column.

2. Log in to the client system using an account that has Administrator privileges. You do not need to log in to the Workplace XT application.
3. Locate the FileNet Integration for Microsoft Office installation software package.
4. Run the installation program `IBMFileNetIntegrationForMicrosoftOffice.exe`. If the installer detects that you do not have all the necessary prerequisites installed, it prompts you to perform those installations. If a reboot is required, you can accept the reboot from the installer, or reboot manually. The installation program continues automatically. Do not try to restart the installation program, because this can cause problems with the installation.
5. Complete the FileNet Integration for Microsoft Office installer screens by using the values from your worksheet.

The installation program provides a list of errors that might occur while you are installing FileNet Integration for Microsoft Office. The list includes descriptions

and resolutions for each error. Access the list in Acreesso(TM) Software user documentation **Acreesso HelpNet → InstallShield 12 Help Library → Reference → Errors and Warnings → Setup.exe Return Values and Run-Time Errors (Basic MSI and InstallScript MSI Projects)**.

[http://helpnet.acresso.com/robo/projects/installshield12helplib/IHelpSetup\\_EXEErrors.htm](http://helpnet.acresso.com/robo/projects/installshield12helplib/IHelpSetup_EXEErrors.htm)

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## Installing FileNet Integration for Microsoft Office silently

To install FileNet Integration for Microsoft Office silently, run the software package from the command line using the `/s` and `/qn` switches.

For SSL environments, provide the secure (https://) Content Engine URL for the parameter value.

To install the software silently:

1. Log in to the server using an account that has Administrator privileges. You do not need to log in to the Workplace XT application.
2. Locate the FileNet Integration for Microsoft Office installation software package.
3. Open a command prompt and change the current directory to the one where `IBMFileNetIntegrationForMicrosoftOffice.exe` resides.
4. Type the following at the command line:

```
IBMFileNetIntegrationForMicrosoftOffice.exe /s /v"/qn  
<additional arguments included in string>  
LICENSE_ACCEPTED=true"
```

Use the `/s` switch and include the `/qn` switch to launch the installation silently.

You must include the `LICENSE_ACCEPTED=true` parameter and value in the command to indicate that you accept IBM and non-IBM terms.

If the installer detects that you do not have all the necessary prerequisites installed, it prompts you to perform those installations. If the installation program requires a reboot, it is done automatically. After the reboot, you must restart the installation with the command line entry.

Refer to the following optional command line values you can also use. Append the values within the string containing the arguments.

**Important:** When there are spaces in the property values, the entire value must be surrounded by quotes (`"`). The quote must be preceded with a slash because the entire value of the `/v` argument, which includes the property values, is also surrounded by quotes.

For example:

```
IBMFileNetIntegrationForMicrosoftOffice.exe /s /v"/qn /L*v  
C:\SetupLogFile.txt CEURL="http://CE Server  
Name:port/wsi/FNCEWS40MTOM/" WORKPLACEXTURL="http://Workplace XT  
Server Name:port/WorkplaceXT/" HELPURL="http://Help Server  
Name:port/ecm_help" PREFERENCESNAME=PreferenceName  
PREFERENCESOBJECTSTORE="Preference ObjectStore"  
LICENSE_ACCEPTED=true"
```



Command Line Values	Settings
INSTALLDIR	<p>This is set by default to</p> <p>C:\Program Files\IBM\FileNet Integration for Microsoft Office</p> <p>You do not need to set this for the silent installation unless you want an installation path other than the default.</p>
CEURL	<p>The URL of the Content Engine server, for example:</p> <p><code>http://server_name:port/wsi/FNCEWS40MTOM</code></p>
WORKPLACEXTURL	<p>The URL of the Workplace XT server, for example:</p> <p><code>http://server_name:port/WorkplaceXT</code></p>
HELPURL	<p>The URL of the IBM FileNet P8 documentation server.</p>
PREFERENCESNAME	<p>The name of the preferences file on the Workplace XT server to use.</p>
PREFERENCESOBJECTSTORE	<p>The name of the object store that contains the preferences file.</p>
LICENSE_ACCEPTED	<p>Required to be passed when installing silently to indicate that you accept IBM and non-IBM terms. Value=true.</p>
ADDLOCAL	<p>Used to control what add-ins are installed. Omit to add all of them. Other possible values:</p> <ul style="list-style-type: none"> <li>• Excel</li> <li>• Outlook</li> <li>• PowerPoint</li> <li>• Word</li> </ul> <p>These values can be combined, separated by commas.</p>
SAVE_SETTINGS_FOR_ALL	<p>Used to control if add-ins are installed for all users of the computer, or just the current user. Can be omitted to use the default.</p> <p>Values:</p> <p>1 - for all users</p> <p>2 - current user (default)</p>
IBMECMTAB	<p>Used to control the text of the tab in the office ribbon bar. If omitted, the default value used is "IBM ECM".</p>
PEWSURL	<p>This location identifies the Process Engine web service required to process tasks. See your administrator for the Web address. This setting is only required if you want to process tasks. Do not include a / at the end of the URL, because this can cause connection to the Process Engine to fail.</p>

Command Line Values	Settings
CONNECTIONPOINT	The connection point identifies a specific isolated region in the Process Engine database. See your administrator for the connection point name. This setting is only required if you want to process tasks.
/L*v C:\temp\SetupLogFile.txt	Verbose installation log and specify log location.
SHOWEXITDIALOG	Controls whether an exit dialog is displayed when exiting with a checked out document still open. Set to either true or false, default is false.
SHOWSTACKTRACE	Controls whether a stack trace is displayed on error dialogs. Usually this is used for debugging purposes only. Set to either true or false. The default is false.
LOGGINGLEVEL	Controls what messages are logged in the event log and trace log. The values are NONE, ERROR, WARNING, INFO, FINE, FINER, FINEST. The default is ERROR.
TRACELOGSIZE	Specifies the maximum size of the tracelog file, in bytes. The default value is 5242880 (5MB).

## Configuring processes

In order to use processes in FileNet Integration for Microsoft Office, you must import and transfer the two workflows that are included with the FileNet Integration for Microsoft Office installation software.

To enable use of processes in FileNet Integration for Microsoft Office:

1. Copy the Workflows folder from the FileNet Integration for Microsoft Office installation image to the local client.
2. Log into Workplace XT as a member of the Process Designer access role with rights to the Workflow class on the object store where the processes will be added.
3. Start the add document process for the two files in the Workflows folder, ParallelDocumentApproval.pep and SequentialDocumentApproval.pep.
4. For each added PEP file, change the **Document class** to **Workflow Definition class**.
5. Check the **Major Version** checkbox.
6. Complete the add process for the workflows.
7. Transfer each of the workflows individually by right clicking the workflow name, choosing **Transfer Workflow**, then clicking **Transfer**.

**Important:** Use the existing name for the workflow.

FileNet Integration for Microsoft Office tasks will only display the tasks processed with the two FileNet Integration for Microsoft Office workflows.

FileNet Integration for Microsoft Office does not support the modification of the provided workflows.

If the workflows are not working as expected, use the Process Tracker to manage the workflows. For more information see the IBM FileNet P8 help topic **FileNet P8 Documentation** → **User Help** → **Actions, preferences, and tools** → **Integrate with office applications** → **Work with Integration for Microsoft Office** → **Work with processes and tasks**.

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## Configuration options

The `configuration.ini` file is similar to the bootstrap properties file. The file contains Web addresses for the Content Engine, Workplace XT, and documentation servers. The file also contains the location of the site preferences file defined in the Bootstrap settings site preference.

For more details about bootstrap preferences, see the IBM FileNet P8 help topic **User Help** → **Actions, preferences, and tools** → **Site preferences** → **Bootstrap preferences**. The information in the `configuration.ini` file cannot be stored in a site preference file because it is needed before users log in to FileNet Integration for Microsoft Office. You can update this file when you modify the Web addresses and site preferences file location, and then send the updated information to each client system.

The `configuration.ini` file is created on the system in which FileNet Integration for Microsoft Office is installed. It resides in either of the locations included in the following table. You determine the location when you choose to make FileNet Integration for Microsoft Office available to all users with an account on the system or to the user logged in to the current system during the installation process.

Location of <code>configuration.ini</code> file	Created for..
<code>\Documents and Settings\All Users\Application Data\IBM\FileNet Integration for Microsoft Office</code>	All Users install mode.
<code>\Documents and Settings\<i>Username</i>\Application Data\IBM\FileNet Integration for Microsoft Office</code>	Just Me mode.

If FileNet Integration for Microsoft Office is installed on a Windows Vista, Windows 2008, or Windows 7 system, then the `configuration.ini` will be saved in one of the following locations:

Location of <code>configuration.ini</code> file	Created for..
<code>\ProgramData\IBM\FileNet Integration for Microsoft Office</code>	All Users install mode.
<code>\Users\<i>Username</i>\AppData\Roaming\IBM\FileNet Integration for Microsoft Office</code>	Just Me mode.

“`configuration.ini` settings” on page 12

The `configuration.ini` file identifies the preference settings that are required before users can log in to FileNet Integration for Microsoft Office.

### Related tasks

“Preparing to use FileNet Integration for Microsoft Office in a Single Sign-On (SSO) environment” on page 5

In order to use FileNet Integration for Microsoft Office with SSO, you must configure the SSO environment, the server, and the installation program.

## configuration.ini settings

The configuration.ini file identifies the preference settings that are required before users can log in to FileNet Integration for Microsoft Office.

Use the following table to identify the settings and their definitions.

Settings	Definitions
PreferencesObjectStore	This name and preference name identify where the site preferences file is located. It is defined in the Bootstrap settings site preference.
PreferencesName	This name and object store name identify where the site preferences file is located. It is defined in the Bootstrap settings site preference.
CEURL	This Web address identifies the object stores accessed by users.
WorkplaceXTURL	This Web address is used when you include links to IBM FileNet P8 documents from an integrated application.
HelpURL	This Web address used for accessing the help documentation supporting FileNet Integration for Microsoft Office.
IBMECMTabLabel	This name appears on the <b>IBM ECM</b> tab on the Microsoft Office 2007 Ribbon and on the <b>IBM ECM</b> menu and option in Outlook.
PEWSURL	This location identifies the Process Engine web service required to process tasks. See your administrator for the Web address. This setting is only required if you want to process tasks. Do not include a / at the end of the URL, because this can cause connection to the Process Engine to fail.
ConnectionPoint	The connection point identifies a specific isolated region in the Process Engine database. See your administrator for the connection point name. This setting is only required if you want to process tasks.
LoggingLevel	The logging settings are used to control the errors that are logged in the Microsoft Windows event log.
ShowStackTrace	This setting controls whether the stack trace is available on error message dialog boxes. Values (case sensitive) are true or false. The default setting is false.

Settings	Definitions
SHOWEXITDIALOG	Controls whether an exit dialog is displayed when exiting with a checked out document still open. Set to either true or false, default is false.
SHOWSTACKTRACE	Controls whether a stack trace is displayed on error dialogs. Usually this is used for debugging purposes only. Set to either true or false. The default is false.
LOGGINGLEVEL	Controls what messages are logged in the event log and trace log. The values are NONE, ERROR, WARNING, INFO, FINE, FINER, FINEST. The default is ERROR.
TRACELOGSIZE	Specifies the maximum size of the tracelog file, in bytes. The default value is 5242880 (5MB).



---

## Upgrading IBM FileNet Integration for Microsoft Office

You can upgrade IBM FileNet Integration for Microsoft Office. This component enables you to access IBM FileNet P8 documents from within Microsoft® Office 2007 applications or Outlook.

“Upgrading FileNet Integration for Microsoft Office interactively”

You can use the installation program to interactively upgrade FileNet Integration for Microsoft Office. The program will automatically remove the existing installation before running the upgrade installation.

“Upgrading FileNet Integration for Microsoft Office silently” on page 16

To upgrade FileNet Integration for Microsoft Office silently, run the software package from the command line using the `/s` and `/qn` switches. The installation program automatically removes the existing version before performing the upgrade.

“Configuring processes” on page 18

In order to use processes in FileNet Integration for Microsoft Office, you must import and transfer the two workflows that are included with the FileNet Integration for Microsoft Office installation software.

“Configuration Options” on page 19

The `configuration.ini` file is similar to the bootstrap properties file. The file contains Web addresses for the Content Engine, Workplace XT, and documentation servers. The file also contains the location of the site preferences file defined in the Bootstrap settings site preference.

---

## Upgrading FileNet Integration for Microsoft Office interactively

You can use the installation program to interactively upgrade FileNet Integration for Microsoft Office. The program will automatically remove the existing installation before running the upgrade installation.

For SSL environments, provide the secure (`https://`) Content Engine URL in the installation panel field.

To upgrade interactively:

1. Open your completed Installation and Upgrade Worksheet file.

**Tip:** In the worksheet file, verify that the **Data** → **Filter** → **AutoFilter** command is enabled. To view only Content Engine values, filter by **FIMO Installer** in the **Installation or Configuration Program** column.

2. Log in to the client system using an account that has Administrator privileges. You do not need to log in to the Workplace XT application.
3. Locate the FileNet Integration for Microsoft Office installation software package.
4. Run the installation program `IBMFileNetIntegrationForMicrosoftOffice.exe`. If the installer detects that you do not have all the necessary prerequisites installed, it prompts you to perform those installations. If a reboot is required, you can accept the reboot from the installer, or reboot manually. The installation program continues automatically. Do not try to restart the installation program, because this can cause problems with the installation.

5. Complete the FileNet Integration for Microsoft Office installer screens by using the values from your worksheet.

---

## Upgrading FileNet Integration for Microsoft Office silently

To upgrade FileNet Integration for Microsoft Office silently, run the software package from the command line using the `/s` and `/qn` switches. The installation program automatically removes the existing version before performing the upgrade.

For SSL environments, provide the secure (`https://`) Content Engine URL for the parameter value.

To upgrade the software silently:

1. Log in to the server using an account that has Administrator privileges. You do not need to log in to the Workplace XT application.
2. Locate the FileNet Integration for Microsoft Office installation software package.
3. Open a command prompt and change the current directory to the one where `IBMFileNetIntegrationForMicrosoftOffice.exe` resides.
4. Type the following at the command line:

```
IBMFileNetIntegrationForMicrosoftOffice.exe /s /v"/qn  
<additional arguments included in string>  
LICENSE_ACCEPTED=true"
```

Use the `/s` switch and include the `/qn` switch to launch the upgrade silently.

You must include the `LICENSE_ACCEPTED=true` parameter and value in the command to indicate that you accept IBM and non-IBM terms.

If the installation program detects that you do not have all the necessary prerequisites installed, it prompts you to perform those installations. If the installation program requires a reboot, it is done automatically. After the reboot, you must restart the installation with the command line entry.

Refer to the following optional command line values you can also use. Append the values within the string containing the arguments.

**Important:** When there are spaces in the property values, the entire value must be surrounded by quotes (`"`). The quote must be preceded with a slash because the entire value of the `/v` argument, which includes the property values, is also surrounded by quotes.

For example:

```
IBMFileNetIntegrationForMicrosoftOffice.exe /s /v"/qn /L*v  
C:\SetupLogFile.txt CEURL="\http://CE Server  
Name:port/wsi/FNCEWS40MTOM/" WORKPLACEXTURL="\http://Workplace XT  
Server Name:port/WorkplaceXT/" HELPURL="\http://Help Server  
Name:port/ecm_help" PREFERENCESNAME=PreferenceName  
PREFERENCESOBJECTSTORE="\Preference ObjectStore"  
LICENSE_ACCEPTED=true"
```



Command Line Values	Settings
INSTALLDIR	<p>This is set by default to</p> <p>C:\Program Files\IBM\FileNet Integration for Microsoft Office</p> <p>You do not need to set this for the silent installation unless you want an installation path other than the default.</p>
CEURL	<p>The URL of the Content Engine server, for example:</p> <p><code>http://server_name:port/wsi/FNCEWS40MTOM</code></p>
WORKPLACEXTURL	<p>The URL of the Workplace XT server, for example:</p> <p><code>http://server_name:port/WorkplaceXT</code></p>
HELPURL	<p>The URL of the IBM FileNet P8 documentation server.</p>
PREFERENCESNAME	<p>The name of the preferences file on the Workplace XT server to use.</p>
PREFERENCESOBJECTSTORE	<p>The name of the object store that contains the preferences file.</p>
LICENSE_ACCEPTED	<p>Required to be passed when upgrading silently to indicate that you accept IBM and non-IBM terms. Value=true.</p>
ADDLOCAL	<p>Used to control what add-ins are installed. Omit to add all of them. Other possible values:</p> <ul style="list-style-type: none"> <li>• Excel</li> <li>• Outlook</li> <li>• PowerPoint</li> <li>• Word</li> </ul> <p>These values can be combined, separated by commas.</p>
SAVE_SETTINGS_FOR_ALL	<p>Used to control if add-ins are installed for all users of the computer, or just the current user. Can be omitted to use the default.</p> <p>Values:</p> <p>1 - for all users</p> <p>2 - current user (default)</p>
IBMECMTAB	<p>Used to control the text of the tab in the office ribbon bar. If omitted, the default value used is "IBM ECM".</p>
PEWSURL	<p>This location identifies the Process Engine web service required to process tasks. See your administrator for the Web address. This setting is only required if you want to process tasks. Do not include a / at the end of the URL, because this can cause connection to the Process Engine to fail.</p>

Command Line Values	Settings
CONNECTIONPOINT	The connection point identifies a specific isolated region in the Process Engine database. See your administrator for the connection point name. This setting is only required if you want to process tasks.
/L*v C:\temp\SetupLogFile.txt	Verbose installation log and specify log location.
SHOWEXITDIALOG	Controls whether an exit dialog is displayed when exiting with a checked out document still open. Set to either true or false, default is false.
SHOWSTACKTRACE	Controls whether a stack trace is displayed on error dialogs. Usually this is used for debugging purposes only. Set to either true or false. The default is false.
LOGGINGLEVEL	Controls what messages are logged in the event log and trace log. The values are NONE, ERROR, WARNING, INFO, FINE, FINER, FINEST. The default is ERROR.
TRACELOGSIZE	Specifies the maximum size of the tracelog file, in bytes. The default value is 5242880 (5MB).

## Configuring processes

In order to use processes in FileNet Integration for Microsoft Office, you must import and transfer the two workflows that are included with the FileNet Integration for Microsoft Office installation software.

To enable use of processes in FileNet Integration for Microsoft Office:

1. Copy the Workflows folder from the FileNet Integration for Microsoft Office installation image to the local client.
2. Log into Workplace XT as a member of the Process Designer access role with rights to the Workflow class on the object store where the processes will be added.
3. Start the add document process for the two files in the Workflows folder, ParallelDocumentApproval.pep and SequentialDocumentApproval.pep.
4. For each added PEP file, change the **Document class** to **Workflow Definition class**.
5. Check the **Major Version** checkbox.
6. Complete the add process for the workflows.
7. Transfer each of the workflows individually by right clicking the workflow name, choosing **Transfer Workflow**, then clicking **Transfer**.

**Important:** Use the existing name for the workflow.

FileNet Integration for Microsoft Office tasks will only display the tasks processed with the two FileNet Integration for Microsoft Office workflows.

FileNet Integration for Microsoft Office does not support the modification of the provided workflows.

If the workflows are not working as expected, use the Process Tracker to manage the workflows. For more information see the IBM FileNet P8 help topic **FileNet P8 Documentation** → **User Help** → **Actions, preferences, and tools** → **Integrate with office applications** → **Work with Integration for Microsoft Office** → **Work with processes and tasks**.

---

## Configuration Options

The configuration.ini file is similar to the bootstrap properties file. The file contains Web addresses for the Content Engine, Workplace XT, and documentation servers. The file also contains the location of the site preferences file defined in the Bootstrap settings site preference.

For more details about bootstrap preferences, see the IBM FileNet P8 help topic **User Help** → **Actions, preferences, and tools** → **Site preferences** → **Bootstrap preferences**. The information in the configuration.ini file cannot be stored in a site preference file because it is needed before users log in to FileNet Integration for Microsoft Office. You can update this file when you modify the Web addresses and site preferences file location, and then send the updated information to each client system.

The configuration.ini file is created on the system on which FileNet Integration for Microsoft Office is installed. It resides in either of the locations included in the following table. You determine the location when you choose to make FileNet Integration for Microsoft Office available to all users with an account on the system or to the user logged in to the current system during the installation process.

Location of configuration.ini file	Created for..
\Documents and Settings\All Users\Application Data\IBM\FileNet Integration for Microsoft Office	All Users install mode.
\Documents and Settings\ <i>Username</i> \Application Data\IBM\FileNet Integration for Microsoft Office	Just Me mode.

If FileNet Integration for Microsoft Office is installed on a Windows Vista, Windows 2008, or Windows 7 system, then the configuration.ini will be saved in one of the following locations:

Location of configuration.ini file	Created for..
\ProgramData\IBM\FileNet Integration for Microsoft Office	All Users install mode.
\Users\ <i>Username</i> \AppData\Roaming\IBM\FileNet Integration for Microsoft Office	Just Me mode.

“configuration.ini settings”

The configuration.ini file identifies the preference settings that are required before users can log in to FileNet Integration for Microsoft Office.

### configuration.ini settings

The configuration.ini file identifies the preference settings that are required before users can log in to FileNet Integration for Microsoft Office.

Use the following table to identify the settings and their definitions.

<b>Settings</b>	<b>Definitions</b>
PreferencesObjectStore	This name and preference name identify where the site preferences file is located. It is defined in the Bootstrap settings site preference.
PreferencesName	This name and object store name identify where the site preferences file is located. It is defined in the Bootstrap settings site preference.
CEURL	This Web address identifies the object stores accessed by users.
WorkplaceXTURL	This Web address is used when you include links to IBM FileNet P8 documents from an integrated application.
HelpURL	This Web address used for accessing the help documentation supporting FileNet Integration for Microsoft Office.
IBMECMTabLabel	This name appears on the <b>IBM ECM</b> tab on the Microsoft Office 2007 Ribbon and on the <b>IBM ECM</b> menu and option in Outlook.
PEWSURL	This location identifies the Process Engine web service required to process tasks. See your administrator for the Web address. This setting is only required if you want to process tasks. Do not include a / at the end of the URL, because this can cause connection to the Process Engine to fail.
ConnectionPoint	The connection point identifies a specific isolated region in the Process Engine database. See your administrator for the connection point name. This setting is only required if you want to process tasks.
LoggingLevel	The logging settings are used to control the errors that are logged in the Microsoft Windows event log.
ShowStackTrace	This setting controls whether the stack trace is available on error message dialog boxes. Values (case sensitive) are true or false. The default setting is false.
SHOWEXITDIALOG	Controls whether an exit dialog is displayed when exiting with a checked out document still open. Set to either true or false, default is false.
SHOWSTACKTRACE	Controls whether a stack trace is displayed on error dialogs. Usually this is used for debugging purposes only. Set to either true or false. The default is false.
LOGGINGLEVEL	Controls what messages are logged in the event log and trace log. The values are NONE, ERROR, WARNING, INFO, FINE, FINER, FINEST. The default is ERROR.

---

<b>Settings</b>	<b>Definitions</b>
TRACELOGSIZE	Specifies the maximum size of the tracelog file, in bytes. The default value is 5242880 (5MB).

---



---

## Removing IBM FileNet Integration for Microsoft Office

You can remove IBM FileNet Integration for Microsoft Office if you do not need it anymore or if you want to do a completely new installation. You can remove IBM FileNet Integration for Microsoft Office using the interactive tool, or silently from the command line.

“Removing or modifying FileNet Integration for Microsoft Office”

You can remove or modify FileNet Integration for Microsoft Office by using the **Add/Remove Programs** function in Windows.

“Silently removing FileNet Integration for Microsoft Office”

You can remove FileNet Integration for Microsoft Office by using a Windows command line tool.

---

## Removing or modifying FileNet Integration for Microsoft Office

You can remove or modify FileNet Integration for Microsoft Office by using the **Add/Remove Programs** function in Windows.

To remove or modify FileNet Integration for Microsoft Office:

1. Click **Start** → **Settings** → **Control Panel**.
2. Click **Add/Remove Programs**, and then click **FileNet Integration for Microsoft Office**.
3. Do one of the following:
  - Click **Remove**, then click **Yes** to confirm you want to uninstall FileNet Integration for Microsoft Office.
  - Click **Change** to access maintenance wizard, and then click **Next**. You can modify, repair, or remove FileNet Integration for Microsoft Office using the maintenance wizard.
    - Select **Modify** to add or remove integration with Microsoft applications from your previous installation. For example, if you have both Microsoft Office and Outlook installed, you can remove one of the applications using this option. The Custom Setup dialog appears, where you can highlight the option you want to add or remove. Click **Next**, and then click **Install**. Click **Finish** to complete the process.
    - Select **Repair** if you want to reinstall FileNet Integration for Microsoft Office in order to repair installation errors. Click **Next**. Click **Install** to start the repair process. Click **Finish** to complete the process.
    - Select **Remove** to remove FileNet Integration for Microsoft Office from your system, and then click **Next**. Click **Remove**. Once the application is removed from your system, click **Finish** to complete the process.

---

## Silently removing FileNet Integration for Microsoft Office

You can remove FileNet Integration for Microsoft Office by using a Windows command line tool.

To silently remove FileNet Integration for Microsoft Office:

1. Open a command prompt.
2. Enter the following command to remove FileNet Integration for Microsoft Office and create a log file called `FIM0Uninstall.txt`:

```
msiexec.exe /X {F1C4702C-69E1-4464-A486-33E6538C9C70} /qn /L*v  
C:\FIMUninstall.txt
```



---

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